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ABSTRACT

This manual provides curriculum materials for implementing a career exploration class in marketing and distribution occupations within a Practical Arts Education program for middle/junior high school students. Introductory materials include the program master sequence, a list of marketing and distribution occupations, and an overview of the competency-based instructional system for practical arts. The instructor's guide to learning activities contains guide sheets for each task assignment sheet; these guide sheets present objectives, attitudes and values to be developed, checkout activities, recommended references and audiovisuals, notes and suggestions for instruction, and references and necessary tools and equipment. Master copies of learning activities are included. Appendixes include a list of practical arts videotapes, a list of references appropriate for career exploration, and ideas for addressing students with special needs. The 41 student task assignment sheets are also included. Each contains the following components: an introduction, objectives, learning activities, checkout activities, vocabulary, instruction sheets, and a copy of the instructor's final checklist. Tasks are provided for three families of marketing and distribution occupations: market management and research, buying and distribution, and sales and promotion. (YLB)

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Practical Arts
INSTRUCTOR'S MANUAL

MARKETING AND DISTRIBUTION OCCUPATIONS

COMPETENCY- BASED VOCATIONAL EDUCATION

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PRACTICAL ARTS

Marketing and Distribution Cluster

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1982

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PROGRAM MASTER SEQUENCE

PRACTICAL ARTS

(Marketing and Distribution)

CODE NUMBER		MODULE STOCK NUMBER	SLIDE STOCK NUMBER	TAPE STOCK NUMBER
PA-MD-1	Making a Market Research Questionnaire	5-870	*	*
PA-MD-2	Conducting a Market Survey	5-871	*	*
PA-MD-3	Making Decisions Based on Market Research	5-872	*	*
PA-MD-4	Planning a Store Layout	5-873	*	*
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PA-MD-6	Handling In-Store Accidents	5-875	*	*
PA-MD-7	Observing for Shoplifters	5-876	*	*
PA-MD-8	Preventing Shoplifting	5-877	*	*
PA-MD-9	Dealing with Shoplifters	5-878	*	*
PA-MD-10	Handling Customer Complaints	5-879	*	*
PA-MD-11	Placing Telephone Orders	5-880	*	*
PA-MD-12	Ordering Merchandise by Requisition	5-881	*	*
PA-MD-13	Identifying Warehouse Equipment	5-882	*	*
PA-MD-14	Checking In Merchandise	5-883	*	*
PA-MD-15	Storing Merchandise	5-884	*	*
PA-MD-16	Coding and Price Marking Merchandise	5-885	*	*
PA-MD-17	Stocking Shelves and Tables	5-886	*	*
PA-MD-18	Making Show Cards	5-887	*	*
PA-MD-19	Setting Up Counter/Table Top Displays	5-888	*	*
PA-MD-20	Proofing Ad Layouts	5-889	*	*
PA-MD-21	Planning a Grand Opening	5-890	*	*
PA-MD-22	Getting the Cash Drawer Ready for Business	5-891	*	*
PA-MD-23	Planning a Sales Greeting/Opening	5-892	*	*
PA-MD-24	Determining Customer Wants and Needs	5-893	*	*
PA-MD-25	Getting Information About Merchandise	5-894	*	*
PA-MD-26	Planning to Explain and Demonstrate Merchandise	5-895	*	*
PA-MD-27	Handling Customer Objections	5-896	*	*
PA-MD-28	Planning Sales Closings	5-897	*	*
PA-MD-29	Making a Sales Presentation	5-898	*	*
PA-MD-30	Writing a Sales Slip	5-899	*	*
PA-MD-31	Examining Checks	5-900	*	*
PA-MD-32	Making Change	5-901	*	*
PA-MD-33	Gift Wrapping	5-902	*	*
PA-MD-34	Bagging Merchandise	5-903	*	*
PA-MD-35	Taking Telephone Orders	5-904	*	*
PA-MD-36	Preparing Packages for Mailing	5-905	*	*
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PA-MD-40	Preparing to Take Inventory	5-909	*	*
PA-MD-41	Taking Inventory	5-910	*	*
PA-MD	Perishable	*	*	*
PA-MD	Supplemental	*	*	*
PA-MD	Instructor's Manual	5-612	*	*

MARKETING AND DISTRIBUTION JOB FAMILIES AND RELATED TASKS

Market Management and Research

1. Make a Market Research Questionnaire
2. Conduct a Market Survey
3. Make Decisions Based on Market Research
4. Plan a Store Layout
5. Observe Store Safety
6. Handle In-Store Accidents
7. Proof Ad Layouts
8. Plan a Grand Opening
9. Get the Cash Drawer Ready for Business
10. Handle Customer Complaints
11. Deal with Shoplifters

Buying and Distribution

12. Place a Telephone Order
13. Order Merchandise by Requisition
14. Identify Warehouse Equipment
15. Check In Merchandise
16. Store Merchandise
17. Code and Price Mark Merchandise
18. Prepare Packages for Mailing
19. Prepare to Take Inventory
20. Take Inventory

Sales and Promotion

21. Make Show Cards
22. Set Up Counter/Table-Top Displays
23. Stock Shelves and Tables
24. Plan a Sales Greeting/Opening
25. Determine Customer Wants and Needs
26. Get Information About Merchandise
27. Plan to Explain and Demonstrate Merchandise
28. Handle Customer Objections
29. Plan a Sales Closing
30. Make a Sales Presentation
31. Write a Sales Slip
32. Examine Checks
33. Make Change
34. Gift Wrap
35. Bag Merchandise
36. Take Telephone Orders
37. Record Payments on Charge Accounts
38. Record Cash Refunds
39. Prepare the Cashier's Report
40. Observe for Shoplifters
41. Prevent Shoplifting

MARKETING AND DISTRIBUTION OCCUPATIONS

Market Management and Research Job Family

- Store Owner/Manager
- Store Supervisor
- Department Manager
- Warehouse Manager
- Advertising Manager
- Personnel Manager
- Fashion Coordinator
- Marketing Research Analyist

Buying and Distribution Job Family

- Buyer
- Purchase Order Clerk
- Receiving Clerk
- Store Clerk
- Stock Checker
- Marker
- Order Filler
- Wrapper
- Merchandise Deliverer
- Warehouse Foreman

Sales and Promotion Job Family

- Counter Clerk
- Demonstrator
- Salesperson
- Sales Representative
- Personal Shopper
- Layaway Clerk
- Fashion Model
- Fashion Stylist
- Display Artist
- Merchandise Displayer
- Advertising Proofreader
- Cashier-Checker
- Bagger
- Gift Wrapper

OVERVIEW OF THE CBVE INSTRUCTIONAL SYSTEM FOR PRACTICAL ARTS

Overview of Program

The purpose of the Practical Arts Education program is to broaden the experiences of middle/junior high school students by providing them with an opportunity to become oriented to the world of work and explore a diversity of career goals in order that they may be better prepared to make decisions on their personal needs and future goals. The Practical Arts program consists of a series of career exploration classes based on the occupational clusters spread over a two-year period. A cruise through each occupational cluster shall include the implementation of three behavioral components or domains.

(A) Cognitive: Students shall survey or cruise the content of the occupational cluster. This survey should include the scope, levels, working conditions, entry requirements, duties performed, opportunities, and related jobs in the occupational cluster.

(B) Psychomotor: Students shall have in each cluster experiences of tasks that will be the same as or similar to those who work in the occupational cluster. These experiences or tasks shall be action oriented, vary with the students' interests, aptitudes, and abilities, and be at various levels of employment within a cluster.

(C) Affective: Students shall receive guidance and the opportunity to systematically apply those knowledges and experiences within the cluster to his/her own interest and abilities, his/her present and future choices, and future occupational decisions and experiences.

The competency-based vocational education curriculum is specifically directed at the psychomotor, activities, experience, or tasks aspect of the Practical Arts program. Teachers are encouraged to augment their lesson plans with cognitive information about the occupational clusters from other sources. The curriuclum here will help specifically in the psychomotor aspect of the program.

Competency-Based Vocational Education

The purpose of this manual is to aid the instructor in implementing a competency-based instructional program. It is intended as a guide and resource for the teacher using CBVE materials. The materials in any occupational area have several common elements, particularly their purpose and their format, which will be discussed later.

Regardless of the delivery system used to implement it, CBVE is based on the concept of competencies. That is to say, it is an instructional system in which: (1) the competencies for specific occupations are built around tasks validated by incumbent workers; (2) instruction is designed around performance objectives based on the worker tasks; (3) students are held accountable for meeting the specified minimum standards of performance required for entry-level jobs.

These instructional materials have been developed by Kentucky teachers. They have attempted to provide relevant learning activities and performance objectives which include: (1) the skills (or tasks) which the student must learn; (2) the conditions under which the student must perform; and (3) the standard or level of achievement to which the student must perform.

The purpose of the Curriculum Unit (CBVE) is to develop and assist the implementation of competency-based instructional materials. The Unit is located at:

1910 Capital Plaza Tower
Frankfort, KY 40601

To facilitate the implementation of CBVE materials, a person has been identified in each vocational region as a CBVE Contact Person. Please address any problems or concerns about your CBVE program to your Regional Contact Person.

By the time you receive your CBVE materials, you should have attended a workshop for teachers implementing CBVE materials. The Inservice Education modules, which were distributed at the workshop, are your greatest source of suggestions for setting up and managing a CBVE program. For more detailed information, consult your inservice modules or your Regional Contact Person.

Using the Instructor's Manual

This Instructor's Manual is divided into two sections: introductory materials and Instructor's Guide to Learning Activities. The introductory materials include, among other things, the Program Master Sequence. It contains a listing of the task assignment sheet and slide/tape titles, code numbers, and stock numbers.

You can use the Program Master Sequence as a quick reference guide to the contents of the instructional program, as well as a checklist for insuring that all materials have been received. The code numbers and stock numbers serve as a guide to ordering additional materials.

The Instructor's Guide to Learning Activities is the heart of this manual, because it contains a brief listing of the contents of each task assignment sheet with suggestions for its use. It is suggested that you insert the corresponding task assignment sheet behind the Guide Sheets so you will have the complete program in one place.

Format is consistent throughout all CBVE programs in that the materials contain the same basic components:

Introduction - tells the student what he/she will learn and why it is important.

Objective - clearly states what the student is expected to know or do, under what conditions, and how well.

Learning Activities - a "road map" for the student to follow in going through the task assignment sheets; list the various activities the student will perform in learning the task.

Instructor's Final Checklist - tells the student and the instructor exactly what the student will be evaluated on in the check-out activity; the instructor uses this sheet to rate the student's performance.

Check-Out Activities - tells the student what he/she will be asked to do for the final test or performance.

The Instructor's Guide Sheets in this manual present the essential information in capsule form. In addition, they list: the recommended references and audio-visuals; attitudes and values to be developed; notes and suggestions for instruction; alternate activities for students; necessary tools and equipment; and space for teacher's notes.

The task assignment sheets are designed to be left intact. Students should be reminded not to write on any of the pages. In some cases, they will be required to obtain duplicates or sheets like the ones shown. These are often student self-checks. They can be filed in a folder and can be obtained as needed.

The Instructor's Final Checklist is another page that should not be written on. It should remain in the task assignment sheet although you may want to make additional copies of it to place in students' folders.

INSTRUCTOR'S GUIDE TO LEARNING ACTIVITIES

MAKING A MARKET RESEARCH QUESTIONNAIRE

OBJECTIVE

GIVEN three problems and a basic questionnaire outline,

MAKE A MARKET RESEARCH QUESTIONNAIRE.

YOUR QUESTIONNAIRE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will be aware of the fact that most successful retail store owners/managers base many important decisions on opinions and experiences of their customers or potential customers.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. PLANNING A MARKET RESEARCH QUESTIONNAIRE	2
Instructor's Final Checklist	
MAKING A MARKET RESEARCH QUESTIONNAIRE	4

CHECK-OUT ACTIVITIES

Your teacher will give you a copy of the problems and a basic questionnaire outline.

Use the outline as a guide in making a market research questionnaire.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students find samples of questionnaires and bring them to class. Have them discuss the different kinds of questions involved. Questionnaires may be found in a number of publications as well as obtained through the U.S. mail.	Sample questionnaires Suggested Resources: Breen, Do-it-yourself Marketing Research, McGraw-Hill Book Company "A Department Store in the Classroom," Sears, Roebuck, and Co. Consumer Information Services D/703 Sears Tower Chicago, IL 60684 Hutt, Creating a New Enterprise, South-Western Publishing Co.	
2	Have the class read Instruction Sheet I. Discuss the points to consider when planning a questionnaire.	Instruction Sheet I	
3	Have students read and discuss Instruction Sheet II. Make a transparency of the sample market research questionnaire. Present and discuss each section of the questionnaire.	Instruction Sheet II Sample market research questionnaire (Master copy is in this section.)	
4	Duplicate a copy of the Check-Out Activity Sheet for each student, or write the basic questionnaire outline on the chalkboard.	Check-Out Activity Sheet (Master copy is in this section.)	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Using the outline as a guide, have each student develop a market research questionnaire. (The goal of the questionnaire is to help students decide what merchandise and services to offer in the school bookstore.) Use the Instructor's Final Checklist to evaluate each questionnaire. NOTE: The questionnaire will be used for the next task assignment sheet.	Instructor's Final Checklist (Master copy is in this section.)	

SAMPLE MARKET RESEARCH QUESTIONNAIRE

We are considering opening a school bookstore. We are asking you to help us make some decisions: Should we open the store? If so, what hours should the store be open, and what goods and services should we offer? Will you please answer the following questions by checking the appropriate blanks.

I. Personal Information:

Age range: 12-13 ____
14-15 ____
16-17 ____
18-19 ____
Over 19 ____

Sex: Male ____
Female ____

Position: Student ____
Teacher ____
Administrator ____
Other ____

School Organizations: Band ____
Athletic ____
Youth ____
Other ____

II. Would you prefer to buy supplies from a school bookstore?

Yes ____
No ____

III. During which hours of the school day are the most convenient for you to buy bookstore supplies?

8:00 - 9:00 ____
9:00 - 10:00 ____
10:00 - 11:00 ____
11:00 - 12:00 ____

12:00 - 1:00 ____
1:00 - 2:00 ____
2:00 - 3:00 ____
Other ____

IV. Approximately how much do you spend each time you buy bookstore supplies?

$ .10 - $.99 ____
$1.00 - $2.00 ____
$2.00 - $3.00 ____
$3.00 - $4.00 ____
$4.00 - $5.00 ____
Over $5.00 ____

V. What types of bookstore supplies are you interested in buying?

General school supplies ____
Clothing ____
Novelty items ____

Sample Questionnaire (p. 2)

VI. What types of services do you expect a bookstore to offer?

Gift wrapping ____
Monogramming ____
Others (please specify) ____

Please return your completed questionnaire to: Jamie Brown
Room 101

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Instructor's Final Checklist

MAKING A MARKET RESEARCH QUESTIONNAIRE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's market research questionnaire included:

	Accomplished	Not Accomplished
1. A title	[ ]	[ ]
2. The problems to be solved	[ ]	[ ]
3. Directions for filling out the questionnaire	[ ]	[ ]
4. Question(s) for each of the six information topics listed on the basic outline:		
a. Multiple choice	[ ]	[ ]
or		
b. True/False	[ ]	[ ]
or		
c. Rating scale	[ ]	[ ]
5. Directions for returning the completed questionnaire.	[ ]	[ ]

Check-Out Activity

MAKING A MARKET RESEARCH QUESTIONNAIRE

Make a market research questionnaire to find the answers to the following: Should we open a school bookstore? What merchandise should we offer? What services should we offer? Follow the basic outline below.

1. TITLE OF QUESTIONNAIRE.

2. PROBLEMS TO BE SOLVED.

3. DIRECTIONS FOR FILLING OUT QUESTIONNAIRE.

4. INFORMATION TO BE OBTAINED FROM TARGET CUSTOMERS:

    a. Personal information.
    b. Store preference for buying bookstore supplies.
    c. Approximate amount spent for bookstore supplies.
    d. Types of bookstore supplies which interest the customer (general school supplies, clothing, novelty items, etc.--not specific items such as "notebooks").
    e. Type of services that interest the customer.

MAKING CHANGE

OBJECTIVES

USING the market research questionnaire you made in Task Assignment Sheet PA-MD-1,

CONDUCT A MARKET SURVEY.

TEN PEOPLE should be surveyed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The students will learn that giving potential customers an opportunity to express their needs and desires helps the store owner establish customer good will.

CONTENTS OF MODULE

Instructor's Final Checklist	Learning Activity Number
I. CONDUCTING A MARKET SURVEY	3

CHECK-OUT ACTIVITIES

Turn in the ten completed questionnaires to your teacher.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	NOTE: Before students conduct surveys, you may want to get the permission of your school administrator for this activity.		
1	Have students make eleven copies of their questionnaires. (They will have the original and eleven copies.)	Each student's market research questionnaire prepared in Task Assignment Sheet PA-MD-1.	
2	Have each student list ten people in your school whom he/she considers target customers, and deliver a copy of a questionnaire to each or conduct the interview himself/herself. (Students should keep the original copy.)	Ten copies of each student's questionnaire.	
3	Have each student turn in all completed questionnaires. Use the Instructor's Final Checklist to evaluate each student's performance. NOTE: The completed questionnaires will be used in the next task assignment sheet.	Completed questionnaires Instructor's Final Checklist	

Instructor's Final Checklist

CONDUCTING A MARKET SURVEY

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In conducting a market survey, the student:

	Accomplished	Not Accomplished
1. Surveyed ten people connected with the school.............	[ ]	[ ]

MAKING DECISIONS BASED ON MARKETING RESEARCH

OBJECTIVE

GIVEN the results of the marketing survey completed in Task Assignment Sheet PA-MD-2 and copies of the problems stated in the questionnaire,

MAKE A DECISION ON EACH PROBLEM. IDENTIFY THE DATA USED AS A BASIS FOR EACH DECISION.

YOUR DECISIONS should be valid as indicated by the data used.

ATTITUDES AND VALUES TO BE DEVELOPED

--Students will understand the value of the store owner/manager basing his/her decisions on data that has been collected from potential customers.

CONTENTS

Instructor's Final Checklist	Learning Activity Number
MAKING DECISIONS BASED ON MARKETING RESEARCH	3

CHECK-OUT ACTIVITIES

Your teacher will provide a copy of the three problems stated in the questionnaire.

Make a decision on each problem. Identify the data you used as a basis for your decision.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	NOTE: Before students identify products to be included in a basic stock list, determine which, if any, products are not acceptable for your bookstore. For example, the Physical Education Department may already sell T-shirts.		
1	Divide the class into six groups. Provide each group with a supply of completed questionnaires. Have students in each group tally the answers to one of the questions on the questionnaires. (The questionnaires may be rotated among the groups so that each group receives all copies.) When answers for the six questions have been tallied, write the results on the chalkboard as each group reports.	Questionnaires completed in Task Assignment Sheet PA-MD-2	
2	Review the three problems stated on the questionnaire. Have the class discuss which items of the data can be used for making decisions for each of the problems. For example, in deciding what merchandise to offer, data concerning types of merchandise, age of customer, and amount of money spent can be used.	The three problems stated in the questionnaire	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
3	Leave the results of the survey on the chalkboard to be used as reference. Duplicate a copy of the Check-Out Activity Sheet for each student, or write each of the items on the sheet on the chalkboard. Have each student answer each problem and identify the data used to justify the answer. Use the Instructor's Final Checklist to evaluate each student.	Check-Out Activity Sheet Results of the marketing survey Instructor's Final Checklist	
	FOLLOW-UP ACTIVITY: Whether or not the data indicates that a school store should be opened, students should know how to make a basic stock list. Since students have identified types of merchandise to be offered, they may make a listing of items under each type. The stock list may be used as a reference.	"Suggested School Store Stock List" (Master copy in this section.)	

Instructor's Final Checklist

MAKING DECISIONS BASED ON MARKETING RESEARCH

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In making decisions concerning the three problems stated in the questionnaire, the student:	Accomplished	Not Accomplished
1. Made a valid decision, as indicated by the data, for each problem..	☐	☐
2. Identified the data used as a basis for each decision..	☐	☐

Check-Out Activity

MAKING DECISIONS BASED ON MARKETING RESEARCH

Use the data gathered from the market survey on which to base your decision for each problem below.

1. Major Problem: Should we open a school store?

   a. My decision:

   b. Data which helped me make the decision:

2. Minor Problem: What types of merchandise should be offered?

   a. My decision:

   b. Data which helped me make the decision:

3. Minor Problem: What services should be offered?

   a. My decision:

   b. Data which helped me make the decision:

SUGGESTED SCHOOL STORE STOCK LIST*

GENERAL SCHOOL SUPPLIES

Colored pencils
Pens and pencils
Rulers
Erasers
Dividers
Notebook paper
Poster board
Manila folders
Staplers
Reinforcements
Tape
Book covers
Lead for pencils
Dictionaries
Colored paper
Notebooks (3-ring)
Spiral notebooks

DEPARTMENTS USING SPECIAL SUPPLIES

Shop

Glue
Sand paper
Paint brushes
Shop aprons
Safety glasses
Steel wool

Business and Office

Typing paper
Typing erasers
Steno pad
Carbon paper
Correction fluid
Correction tape
Envelopes

Physical Education

Towels
Gym shorts
Socks
T-shirts
Foot powder
Gym suits
Tennis shoes

Chemistry

Plastic aprons
Safety glasses
Graph paper
Spiral notebooks

Home Economics

Zippers
Pin cushions
Needles
Straight pins
Thread
Tape measures
Candy thermometers
Hooks and eyes
Instructional booklets
Patterns
Elastic
Snaps
Gauges
Bobbins
Tracing wheel
Tracing paper

Art

Special lettering pencils
Paint
Charcoal
Pastels
Scratch pads (white)
Water color sets
Canvas boards
Colored pencils
Charcoal pencils
Pen points
Macrame cord
Metric drawing pencils

Math

4 in 1 triangles
Protractors
Slide rules
Compasses
Rulers
Geometers

Stock List (p. 2)

CLOTHING

Jackets
Windbreakers
Sweatshirts
Hats
T-shirts

NOVELTY ITEMS

Key chains
Sun glasses
All occasion greeting cards
Pennants
Decals
Posters
Black lights
Incense
Incense burners
Sew-on patches
Pocket games--tic-tac-toe
Chess
Humorous greeting cards
"Love Is" cards
Scene cards
Panty hose
Candles
Leather goods
Playing cards
Watches

*Adapted by permission from Model/School Store Management Guide, North Dakota State Board for Vocational Education.

PLANNING STORE LAYOUT

OBJECTIVE

DRAW A PLAN FOR YOUR SCHOOL STORE LAYOUT.

YOUR PLAN WILL BE RATED according to the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize the importance of careful planning before arranging a store layout.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. PLANNING A SCHOOL STORE LAYOUT	1
Instructor's Final Checklist	
PLANNING STORE LAYOUT	4

CHECK-OUT ACTIVITIES

Make a neat drawing of the plan you completed in Learning Activity 3.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students read Instruction Sheet I and study the illustration of a school store layout. Discuss the various elements included in the illustration. Call particular attention to the traffic flow indicated by broken lines.	Instruction Sheet I	
2	Work with the class to determine the best location for your school store and the kinds of equipment you will need. If at all possible, identify equipment--tables, bookcases, etc.--that are already available.		
3	Have students make rough sketches of a store layout which is appropriate for the store location and equipment identified in Learning Activity 2. You may arrange for students to go to different types of stores and study their store layout; e.g., Krogers, Penneys, K-mart, Walgreens, etc. Check the sketches to assure that they are in accordance with the Instructor's Final Checklist.	Pencils and paper	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Have each student make a neat drawing of the plan he/she completed in Learning Activity 3. Use the Instructor's Final Checklist to evaluate each store layout plan.	Pencils and paper Instructor's Final Checklist	

Instructor's Final Checklist

PLANNING STORE LAYOUT

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's store layout plan included:

	Accomplished	Not Accomplished
1. Storage space....................................	[ ]	[ ]
2. Display counters and/or shelves....................	[ ]	[ ]
3. A check-out counter................................	[ ]	[ ]
4. A wrapping counter................................	[ ]	[ ]
5. Office space....................................	[ ]	[ ]
6. Ad layout space..................................	[ ]	[ ]
7. An arrangement that permitted traffic to move in a circular path....................................	[ ]	[ ]

OBSERVING STORE SAFETY

OBJECTIVE

GIVEN a picture of a store aisle,

LIST THE UNSAFE CONDITIONS WHICH APPEAR IN THE PICTURE.

AT LEAST SIX of the eight unsafe conditions should be listed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that the purpose of safety rules is to protect store personnel and customers from injury and will take the necessary safety precautions.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. AVOIDING STATES OF MIND THAT CONTRIBUTE TO ACCIDENTS	1
II. TAKING SAFETY PRECAUTIONS	3
Instructor's Final Checklist	
OBSERVING STORE SAFETY	6

CHECK-OUT ACTIVITIES

Your instructor will provide a picture of a store aisle. List the unsafe conditions which appear in the picture.	6

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I. Discuss the nine states of mind that contribute to accidents.	Instruction Sheet I	
2	Divide the class into nine small groups. Assign each group one of the states of mind presented in Instruction Sheet I. Have each group plan and present a short skit depicting the state of mind; or let students choose one to act out and have other students guess which unsafe state of mind they depicted; or write a play with one boss and nine employees named disobedient, forgetful, etc.		
3	Have the class read Instruction Sheet II.	Instruction Sheet II	
4	Discuss the dangerous conditions depicted in the illustration. Have students name other dangerous conditions that can exist in a store. You may have students draw their own pictures of unsafe conditions in a store. Encourage the class to share personal experiences relating to store safety.	Illustration," Dangerous Conditions," in Instruction Sheet I.	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Demonstrate the following for the class: --Lifting a heavy object from the floor --Using a step ladder --Cutting open a package Invite a firefighter from your local fire department to talk with the class about fire safety.	Fairly heavy object that can be lifted from the floor Step ladder Securely taped box Sharp cutting tool to open the box Firefighter from your local fire department.	
6	Distribute a copy of the Check-Out Activity Sheet to each student. Use the Answer Key to check the answers. Use the Instructor's Final Checklist to evaluate each student.	Check-Out Activity Sheet (Master copy is in this section.) Answer Key Instructor's Final Checklist (Master copy is in this section.)	

Instructor's Final Checklist

OBSERVING STORE SAFETY

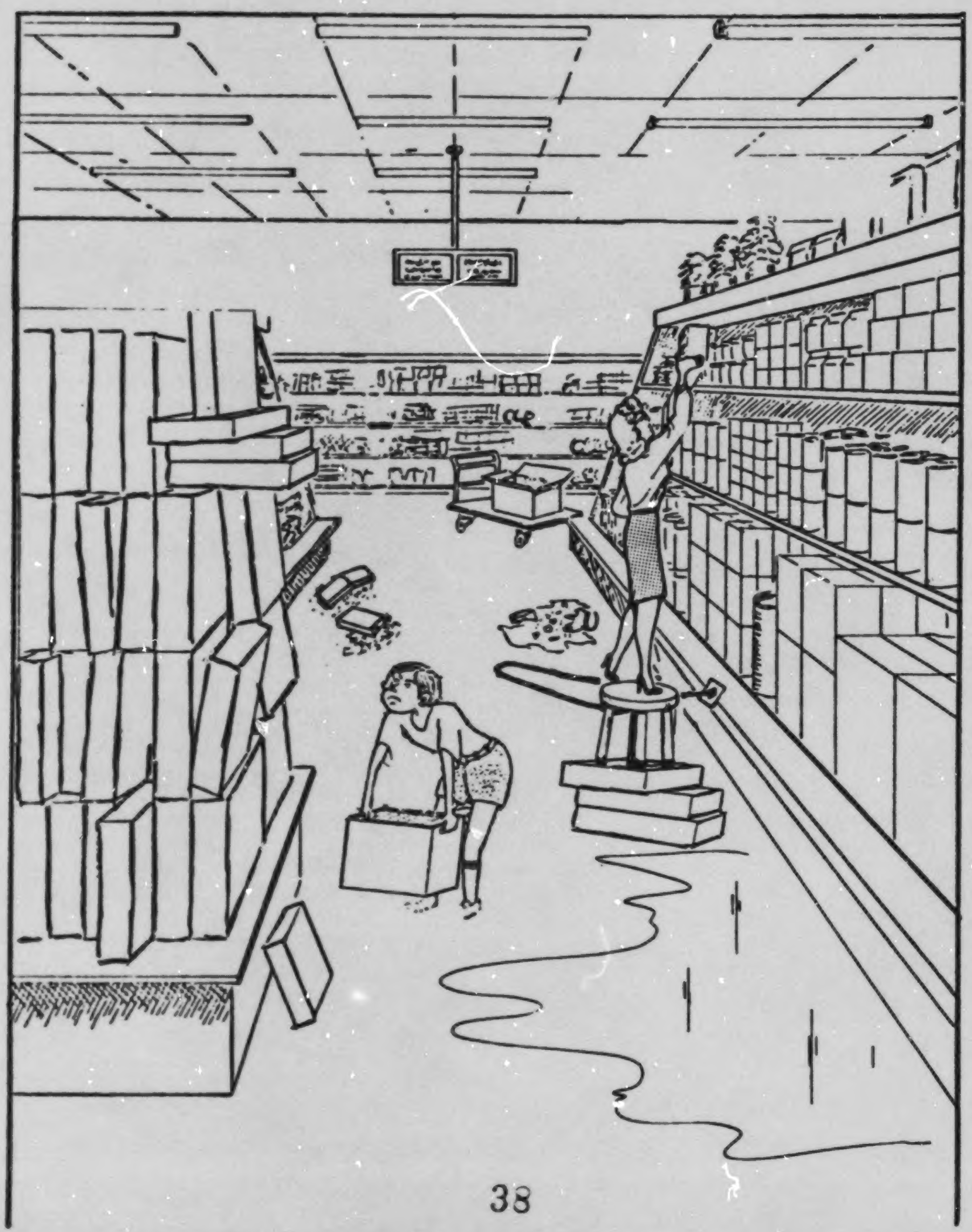
Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
After reviewing the picture of a store aisle, the student listed at least six of the eight unsafe conditions........	[ ]	[ ]

Check-Out Activity

OBSERVING STORE SAFETY

List the unsafe conditions which appear in this picture.



ANSWER KEY

Check-Out Activity

OBSERVING STORE SAFETY

Unsafe conditions depicted in the illustration:

1. Water on floor
2. Unstable display
3. Boy improperly lifting (or placing) heavy object
4. Woman standing on stool which is sitting on unstable pile of boxes
5. Electric cord extending out in aisle
6. Broken glass on floor
7. Merchandise on floor
8. Stock cart in aisle

HANDLING IN-STORE ACCIDENTS

OBJECTIVES

GIVEN a written example of an in-store accident,

WRITE HOW A STORE EMPLOYEE SHOULD HANDLE THE PROBLEM.

YOUR WORK WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that stores have policies concerning in-store accidents. In the event they become the victims of an accident, they will cooperate with the store employee.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. WHAT TO DO IN CASE OF AN ACCIDENT	2
Instructor's Final Checklist	
HANDLING IN-STORE ACCIDENTS	4

CHECK-OUT ACTIVITIES

Your instructor will provide a written example of an in-store accident.

Write how a store employee should handle the situation.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have each student identify a store to contact by telephone in order to determine: 1. How many accidents have occurred in the past few months. 2. What kinds of accidents occurred. The survey can be conducted at home. (If your community is a small one, you may divide the class into teams. A member of each team can contact a store.) Have students report their findings to the class. As a class, compile a list of the most common in-store accidents.	Telephone directory Telephones	
2	Have students read Instruction Sheet I. Discuss each rule presented.	Instruction Sheet I	
3	During this Learning Activity, the class will work in groups on three different projects: 1. Have one group prepare a poster or bulletin board display which portrays an in-store accident.	Magazines or other publications containing pictures Bulletin board Poster board Colored pens or pencils	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	2. Have another group use a series of pictures to show what a store employee should do in case of an accident. a. Magazine pictures may be used. b. Students with drawing talent may make sketches. c. Students interested in photography may take actual photos that depict the rules. 3. Have the third group plan and present a skit about an in-store accident.		
4	Provide each student a Check-Out Activity Sheet, or write the case on the chalk board. Use the Instructor's Final Checklist to evaluate each student's work.	Check-Out Activity Sheet Instructor's Final Checklist	

Instructor's Final Checklist

HANDLING IN-STORE ACCIDENTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In writing how the store employee should handle the in-store accident, the student listed the following:

	Accomplished	Not Accomplished
1. Do not panic	☐	☐
2. Report the accident immediately to the store manager	☐	☐
3. Tell the customer that the store manager has been informed	☐	☐
4. Do everything that can be done safely to make the customer comfortable until help arrives	☐	☐
5. Help the store manager when asked to do so	☐	☐

Check-Out Activity

HANDLING IN-STORE ACCIDENTS

Read the example below of an in-store accident. Write the steps a store employee should take in handling the problem.

CASE

A customer cuts his leg on a piece of metal, and the wound is bleeding freely.

OBSERVING FOR SHOPLIFTERS

OBJECTIVES

GIVEN descriptions of twelve customers,

IDENTIFY THE CUSTOMERS WHO ARE MOST LIKELY TO BE SHOPLIFTERS.

SIX customers should be identified.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will become aware of the seriousness of shoplifting.
--Students will learn about shoplifters' tactics and will be alerted to them.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. SHOPLIFTING--A SERIOUS PROBLEM	1
II. DETECTING POSSIBLE SHOPLIFTERS	5
Instructor's Final Checklist	
OBSERVING FOR SHOPLIFTERS	6

CHECK-OUT ACTIVITIES

Your instructor will provide descriptions of twelve customers.

Check the customers who are most likely to be shoplifters.

SUGGESTED REFERENCES

Play a Part in Crime Prevention. Commercial Union Assurance Companies, One Beacon Street, Boston, Massachusetts 02108. (Features five teaching units--Shoplifting, Buying Stolen Goods, Employee Theft, Juvenile Court, and Vandalism--plus skits, learning posters, and skillbuilding activities for students.) Free of charge.

SUGGESTED AUDIO-VISUAL MATERIAL

"The Rip-Off." 16mm film; 15 min.; a Walt Disney Production on teenage shoplifting and its consequences (F2033). (To borrow this film, call the Office of Crime Prevention toll free 800-372-2994 at least three working days in advance of your showing schedule. It will be sent and picked up by UPS at no cost to you.)

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LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students read Instruction Sheet I. Discuss the magnitude of shoplifting and its serious effects on both the shoplifter and the business. Allow time for students to share their thoughts and opinions on shoplifting.	Instruction Sheet I	
2	Show a film about shoplifting.	"The Rip-Off"	
3	Divide the class into several committees. Have each committee contact a different store in your community to determine the approximate amount of money that was lost to shoplifting last year. Have each committee report to the class.		
4	Have the class read a short article about shoplifting and complete a skillbuilding exercise. When the students have completed the exercise, discuss the answers to the questions.	"Skillbuilder 1," Play a Part in Crime Prevention, pp. 10-11.	
5	Have the class read Instruction Sheet II. Discuss the ways to detect shoplifters as presented.	Instruction Sheet II	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Provide each student a Check-Out Activity Sheet. Use the Answer Key to check each student's answers. Use the Instructor's Final Checklist to evaluate each student.	Check-Out Activity Sheet Answer Key Instructor's Final Checklist	

Instructor's Final Checklist

OBSERVING FOR SHOPLIFTERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
After reviewing descriptions of twelve customers, the student identified the six who are most likely to be shoplifters...	[ ]	[ ]

Check-Out Activity

OBSERVING FOR SHOPLIFTERS

Below are descriptions of twelve customers. Check the customers who are most likely to be shoplifters.

_____ 1. A customer carrying a small purse and leading a small child by the hand.

_____ 2. A customer carrying an unwrapped package of T-shirts.

_____ 3. A customer carrying a paper bag with a receipt stapled to it.

_____ 4. A customer pushing a shopping cart containing several items.

_____ 5. A customer wearing bulky clothing.

_____ 6. A customer wearing a cost that is too large.

_____ 7. A customer carrying a large shopping bag.

_____ 8. A customer carrying a large purse and an umbrella.

_____ 9. A customer examining the prices of several articles.

_____10. A customer asking the salesperson unreasonable questions.

_____11. A customer reading a shopping list.

_____12. A customer and a salesperson listening to a record.

ANSWER KEY

Check-Out Activity

OBSERVING FOR SHOPLIFTERS

Below are descriptions of twelve customers. Check the customers who are most likely to be shoplifters.

_____ 1. A customer carrying a small purse and leading a small child by the hand.

✓ 2. A customer carrying an unwrapped package of T-shirts.

_____ 3. A customer carrying a paper bag with a receipt stapled to it.

_____ 4. A customer pushing a shopping cart containing several items.

✓ 5. A customer wearing bulky clothing.

✓ 6. A customer wearing a coat that is too large.

✓ 7. A customer carrying a large shopping bag.

✓ 8. A customer carrying a large purse and an umbrella.

_____ 9. A customer examining the prices of several articles.

✓ 10. A customer asking the salesperson unreasonable questions.

_____ 11. A customer reading a shopping list.

_____ 12. A customer and a salesperson listening to a record.

Instructor's Guide Sheet Task Assignment Sheet PA-MD-8

PREVENTING SHOPLIFTING

OBJECTIVES

GIVEN eight cases and a list of shoplifting prevention rules,

MATCH EACH CASE WITH THE RULE THAT WOULD HELP PREVENT THE ACTION DESCRIBED.

AT LEAST SIX of the cases must be matched correctly with the rules.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that following some simple basic rules can help deter shoplifting.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. HOW A SALESPERSON CAN HELP PREVENT SHOPLIFTING	2
II. HOW A CASHIER-CHECKER CAN HELP PREVENT SHOPLIFTING	3
Instructor's Final Checklist	
PREVENTING SHOPLIFTING	6

CHECK-OUT ACTIVITIES

Your instructor will provide eight cases and a list of shoplifting prevention rules.

Match each case with the rule that would help prevent the action described.

SUGGESTED REFERENCES

Play a Part in Crime Prevention (See Task Assignment Sheet PA-MD-7 section of this manual.)

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class prepare and present a skit about shoplifting. In order to involve the entire class, you may have different groups to: obtain the props, arrange the props for use during the skit, obtain costumes, make up the characters, and play the character roles. Present for class discussion Follow-Up Questions 1, 6, 7, 8 , and 13.	"Who's To Know?" Play a Part in Crime Prevention, pp. 5-7.	
2	Have the class read Instruction Sheet I. Discuss how each rule presented can help prevent shoplifting.	Instruction Sheet I	
3	Let the class play the game, "What Would You Do If . . .?" Explain how to play: 1. Divide the class into two teams. 2. Have members of one team present cases or questions concerning shoplifting situations. 3. Have opposing team members give the solutions based on the shoplifting prevention rules.		

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	4. Teams take turns asking and answering questions.		
4	Have the class read Instruction Sheet II. Discuss why a cashier-checker should follow the rules presented.	Instruction Sheet II	
5	Demonstrate for the class how to handle the cash register or cash box in order to prevent theft. To do this, demonstrate rules 2-5 in Instruction Sheet II.	Instruction Sheet II Cash register or cash box with lock and key Slip of paper (to represent receipt) Paper bag Stapler or tape	
6	Provide each student a Check-Out Activity Sheet. Use the Answer Key to check each student's answers. Use the Instructor's Final Checklist to evaluate each student.	Check-Out Activity Sheet Answer Key Instructor's Final Checklist	

Instructor's Final Checklist

PREVENTING SHOPLIFTING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
In matching cases with the shoplifting prevention rules that would help prevent the actions described, the student matched at least six of the cases correctly.......	[ ]	[ ]

Check-Out Activity

PREVENTION SHOPLIFTING

Match each case with the rule that would help prevent the action described.

CASE

_____ 1. A suspicious looking character enters the store unnoticed.

_____ 2. You turn around to look for an item of merchandise for a customer. When you turn back around, the customer has disappeared and another item is missing.

_____ 3. You do not have time to straighten up your counter until late in the morning. When you do, you notice several items missing.

_____ 4. Your supervisor calls you to the office immediately. You don't want to take time to lock your display case. When you return, some merchandise is missing.

_____ 5. You place several diamond rings on the counter for a customer to examine.

_____ 6. Several customers are waiting to check out. To speed up the process, you leave the cash register drawer open until all the customers pay for their purchases.

_____ 7. You do not close the cash register drawer until you have bagged a customer's purchase.

_____ 8. It has been discovered that a customer has obtained a refund on an item that was shoplifted.

RULE

a. Know your stock, and keep it in good condition.

b. Never leave locked display cases unlocked.

c. Always close the cash register drawer after each customer's purchase.

d. Always give a receipt for a purchase.

e. Greet every customer who enters the store.

f. Never turn your back on a customer.

g. Avoid placing more than one valuable item at a time on the counter.

h. Do not turn away from the cash register when the cash drawer is open.

ANSWER KEY

Check-Out Activity

PREVENTION SHOPLIFTING

Match each case with the rule that would help prevent the action described.

CASE

_e_ 1. A suspicious looking character enters the store unnoticed.

_f_ 2. You turn around to look for an item of merchandise for a customer. When you turn back around, the customer has disappeared and another item is missing.

_a_ 3. You do not have time to straighten up your counter until late in the morning. When you do, you notice several items missing.

_b_ 4. Your supervisor calls you to the office immediately. You don't want to take time to lock your display case. When you return, some merchandise is missing.

_g_ 5. You place several diamond rings on the counter for a customer to examine.

_c_ 6. Several customers are waiting to check out. To speed up the process, you leave the cash register drawer open until all the customers pay for their purchases.

_h_ 7. You do not close the cash register drawer until you have bagged a customer's purchase.

_d_ 8. It has been discovered that a customer has obtained a refund on an item that was shoplifted.

RULE

a. Know your stock, and keep it in good condition.

b. Never leave locked display cases unlocked.

c. Always close the cash register drawer after each customer's purchase.

d. Always give a receipt for a purchase.

e. Greet every customer who enters the store.

f. Never turn your back on a customer.

g. Avoid placing more than one valuable item at a time on the counter.

h. Do not turn away from the cash register when the cash drawer is open.

DEALING WITH SHOPLIFTERS

OBJECTIVES

1. GIVEN a written example of a shoplifting situation,

   LIST THE STEPS THAT A SALESPERSON SHOULD TAKE IN THE SITUATION.

   THREE STEPS should be listed in accordance with the Instructor's Final Checklist.

2. GIVEN a written example of a shoplifting situation,

   LIST THE STEPS THAT A STORE MANAGER SHOULD TAKE IN THE SITUATION.

   FOUR STEPS should be listed in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that the merchant has legal means by which stolen goods can be recovered and the offender can be punished. On the other hand, the accused also has certain legal rights.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. SALESPERSONS DEALING WITH SHOPLIFTERS	2
II. STORE MANAGERS DEALING WITH SHOPLIFTERS	3

Instructor's Final Checklist	
DEALING WITH SHOPLIFTERS	5

CHECK-OUT ACTIVITIES

1. Your instructor will provide a written example of a shoplifting situation.

   List the steps that a salesperson should take in the situation.

2. Your instructor will provide a written example of a shoplifting situation.

   List the steps that a store manager should take in the situation.

DEALING WITH SHOPLIFTERS

SUGGESTED REFERENCES

Play a Part in Crime Prevention (See Task Assignment Sheet PA-MD-7 section of this manual.)

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Invite a resource person to talk with the class about dealing with customers who are suspected of shoplifting. Have students write a report on the talk. Arrange for a committee of students to visit your local Police Department to investigate how it deals with shoplifters. Have the committee prepare a report for the class. (NOTE: Give students the option of choosing one of the above activities.)	Suggested Resource Person: Local store manager Suggested Field Trip Site: Local Police Department	
2	Have the class read Instruction Sheet I. Discuss: a. Three common ways to detect shoplifting.	Instruction Sheet I	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	b. The steps in reporting shoplifting.		
3	Have the class read Instruction Sheet II. Discuss the step-by-step procedures a store manager should take in dealing with shoplifters.	Instruction Sheet II	
4	Have the class prepare for and present a skit about a juvenile court case. In order to involve the entire class, you may have different groups to: obtain the props, arrange the props for use during the skit, obtain costumes, make up the characters, and play the character roles. After the skit, discuss as a class Follow-Up Questions 10,11, and 12 on page 5 and Follow-Up Question 1 on page 45.	"Judge for Yourself," Play a Part in Crime Prevention, pp. 45-54.	
5	Provide each student with a Check-Out Activity Sheet. Use the Instructor's Final Checklist to check and evaluate each student's work.	Check-Out Activity Sheet Instructor's Final Checklist	

Instructor's Final Checklist

DEALING WITH SHOPLIFTERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
1. The student listed the following steps that a salesperson should take in dealing with the shoplifting situation:		
a. Watch the person carefully. Have another store employee watch, when possible	[ ]	[ ]
b. Notify the store manager or store security immediately	[ ]	[ ]
c. Keep the shoplifter in sight until help arrives	[ ]	[ ]
2. The student listed the following steps that a store manager should take in dealing with the shoplifting situation:		
a. Approach the person and request identification	[ ]	[ ]
b. Ask the person to accompany you to a private location	[ ]	[ ]
c. Ask the person if he/she has the merchandise. If the answer is "yes," request that the merchandise be returned	[ ]	[ ]
d. Notify the police	[ ]	[ ]

Check-Out Activity

DEALING WITH SHOPLIFTERS

Read the following case stories and answer the questions. USE YOUR OWN PAPER. Do not write on this page.

CASE 1:

Betty Lane, a salesperson in a large bookstore, sees a man slip some magazines inside his coat. Betty is sure that this has happened. What should she do?

CASE 2:

Alice Jones is the manager of a small clothing store. She receives a report from one of the salespersons that a lady has just opened her purse and slipped in some stockings. The lady is on her way to the front door. What should Alice do?

HANDLING CUSTOMER COMPLAINTS

OBJECTIVES

GIVEN five customer complaints with two store employee responses for each complaint,

CHOOSE THE CORRECT RESPONSE FOR EACH COMPLAINT.

The correct response must be chosen for at least four of the complaints.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will understand the importance of keeping customers' good will, even when they complain.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. HANDLING CUSTOMER COMPLAINTS	1
Instructor's Final Checklist	
HANDLING CUSTOMER COMPLAINTS	4

CHECK-OUT ACTIVITIES

Your instructor will provide customer complaints with store employee responses of each complaint.

Choose the correct response for each complaint.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students read Instruction Sheet I. Discuss: 1. Guidelines for handling complaints 2. Some examples of customer complaints	Instruction Sheet I	
2	Choose a typical customer complaint, such as a defective product. Demonstrate to the class how a store employee should handle the complaint in order to keep the customer's good will.		
3	Divide the class into small groups. Have members of each group take turns playing the role of store employee and complaining customer, while the other group members critique the handling of the complaint.		
4	Provide each student a Check-Out Activity Sheet. Use the Answer Key to check each student's answers. Use the Instructor's Final Checklist to evaluate each student.	Check-Out Activity Sheet Answer Key Instructor's Final Checklist	

Instructor's Final Checklist

HANDLING CUSTOMER COMPLAINTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
In choosing the correct store employee response for each customer complaint, the student chose the correct response for at least four of the five complaints......................	[ ]	[ ]

Check-Out Activity

HANDLING CUSTOMER COMPLAINTS

Write the letter of the correct response for each of the customer complaints below. USE YOUR OWN PAPER. Do not write on this page.

1. **Customer Complaint**

"This ballpoint pen I bought here yesterday doesn't work well. I think I should have a new one."

Store Employee Response

_____ a. "I'm sorry you are having problems with the pen. May I see your receipt, please? (Customer hands the employee the receipt.) We will be glad to replace your pen, and hope that the situation hasn't caused you too much inconvenience."

_____ b. "I'm sorry about your problem. But that's the chance you take when you buy cheap pens. I told the manager he shouldn't buy shoddy merchandise."

2. **Customer Complaint**

"There's something spilled on the floor."

Store Employee Response

_____ a. "I know, it's been there all morning. Just be careful and step around it. We don't want you to fall and hurt yourself."

_____ b. "Thank you for calling it to my attention. I will take care of it immediately."

3. **Customer Complaint**

"I had to wait ten minutes to get into your parking lot just now."

Store Employee Response

_____ a. "I'm sorry, I don't have time to talk with you at this moment. Can you talk with me about it the next time you come in?"

_____ b. "I'm sorry you had to wait so long. I will tell the manager about your problem as soon as possible."

Check-Out Activity (p. 2)

4. **Customer Complaint**

"You charged me too much for this T-shirt."

Store Employee Response

_____ a. "No, I didn't! If you'll look at the price tag you'll see that the price I charged you is right!"

_____ b. "Did I? Let me check the price tag again. (Show the customer the price on the price tag.) See, the price I charged you is the same as the one marked on the price tag. Do you agree?"

5. **Customer Complaint**

"You charged me too much for this notebook."

Store Employee Response

_____ a. "I'm sorry. I will deduct the overcharge on the cash register receipt. (Show the customer the receipt.) Do you agree with the amount due now?"

_____ b. "I'm sorry. Everybody makes mistakes. Don't worry, I'll take care of it."

ANSWER KEY

Check-Out Activity
HANDLING CUSTOMER COMPLAINTS

1. a.
2. b.
3. b.
4. b.
5. a.

PLACING TELEPHONE ORDERS

OBJECTIVE

GIVEN a written order for merchandise and a telephone training instrument,

PLACE THE ORDER BY TELEPHONE.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will learn the proper use of the telephone.
--Students will realize the importance of giving clear, specific descriptions when ordering merchandise by telephone.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. TELEPHONING AN ORDER	1
Student Self-Check	
I. TELEPHONING AN ORDER	3
Instructor's Final Checklist	
PLACING TELEPHONE ORDERS	4

CHECK-OUT ACTIVITIES

Your instructor will provide an order for merchandise and a telephone training instrument.

Place the order by telephone.

SUGGESTED EQUIPMENT

Toy telephone or
Teletrainer (contact your Bell Telephone System)

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	It is recommended that you arrange for a telephone setup for use in telephoning orders before the class beings this task. It may be necessary to instruct the class in the use of the telephone setup. (NOTE: You may want to present Task Assignment Sheet PA-MD-35, "Taking Telephone Orders," as soon as students complete this task.)	Toy telephones or Teletrainer (Contact your local telephone company.)	
1	Have the class read Instruction Sheet I. Discuss each step for placing a telephone order.	Instruction Sheet I	
2	Prepare a short order of merchandise. Include the name of the order house, and indicate whether the merchandise is to be picked up or delivered. Write the order on the chalkboard. (You may refer to the order in Student Self-Check I.) Demonstrate to the class how to order the merchandise by telephone.	Telephone An order of merchandise	
	Have students practice placing telephone orders by going through Student Self-Check I.	Student Self-Check I	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Since the class will work in pairs, the students may use toy telephones or pretend to use telephones.		
4	Prepare an order of merchandise simfliar to the one in Learning Activity 2. Write it on the chalkboard. Have pairs of students take turns playing the role of order clerk and store manager ordering one of the items of merchandise by telephone, OR Set up ordering stations in the classroom. Provide each station with a telephone. Assign a group of students to each station. Have students take turns ordering merchandise. Use the Instructor's Final Checklist to rate each student's performance. (Members of each group assigned to an ordering station may complete the Instructor's Final Checklist for each other's performance.)	Orders of merchandise Telephone(s) Instructor's Final Checklist	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	(NOTE: If you plan to set up a store with real merchandise, you will need to place the order now in order to be ready for Task 14, "Receiving Merchandise." You may order by telephone or by requisition.)		

Instructor's Final Checklist

PLACING TELEPHONE ORDERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In the process of telephoning an order, the student:

	Accomplished	Not Accomplished
1. Identified self and name of store	☐	☐
2. Placed the order by telling the order clerk:		
a. Name of items	☐	☐
b. Description of items	☐	☐
c. Quantity wanted	☐	☐
3. Asked order clerk to prove the complete order by reading it back	☐	☐
4. Noted any substitutions on order	☐	☐
5. Indicated on order form the date order was placed	☐	☐
6. Indicated on order form the name of the business called	☐	☐

ORDERING MERCHANDISE BY REQUISITION

OBJECTIVES

GIVEN a purchase requisition form and an inventory list,

FILL OUT THE PURCHASE REQUISITION.

YOU SHOULD fill out the proper spaces on the requisition and correctly enter the list of goods.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that ordering only the correct amount of the goods needed can save the store money.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. FILLING OUT A PURCHASE REQUISITION	1
Instructor's Final Checklist	
ORDERING MERCHANDISE BY REQUISITION	3

CHECK-OUT ACTIVITIES

Your instructor will provide a purchase requisition form and an inventory list.

Fill out the purchase requisition.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class study the purchase requisition. Discuss each item on the form. Explain that catalog and/or ordering numbers are not included on the requisition. Those are added by the Purchasing Department.	Instruction Sheet I	
2	Duplicate four copies of the purchase requisition form. Divide the class into four groups. Assign each group a category of merchandise that may be carried in a bookstore; e.g., general school supplies, clothing, food, and novelty items. Have each group list five items of merchandise for its assigned category and fill out a purchase requisition for the merchandise. Display the requisitions. OR Duplicate a copy of the purchase requisition form for each student. Write a list of merchandise (taken from the suggested inventory list) on the chalkboard. Have the class fill out the form, item by item, together.	Purchase requisition form (Master Copy in this section.) "Inventory" (Master Copy in this section.)	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
3	Use the Inventory to compile several brief lists of merchandise. Write them on the chalkboard, or duplicate several copies of the Inventory and make them available so that students can list items of merchandise. Duplicate a copy of the purchase requisition form for each student. Have each student fill out a purchase requisition for the items of merchandise listed. Use the Instructor's Final Checklist to evaluate each purchase requisition.	"Inventory" Purchase requisition form Instructor's Final Checklist	

PURCHASE REQUISITION ORIGINAL

FROM ________________ DEPT. DATE ____________

DATE NEEDED _______________

QUANTITY	DESCRIPTION

Requisition must be approved by Manager before purchase is made.

APPROVED __________________________________ SIGNED _____________________

PURCHASE ORDER NO. ____

ORDERED FROM ____

Inventory

QUANTITY	DESCRIPTION	PRICE
	Eads 3 Subject Notebook 06-9900	
	MCB Spiral Notebook	
	Critter Sitters Memo Book 33298	
	Eads Notebook Paper 15-1110, wide ruled	
	Eads Notebook Paper 17-5118	
	Eads Erasable Bond Typing Paper 38-7160	
	Sco Paper Clips No. 71C 1¼" (100 in box)	
	Goodyear Erasers 453-A (20 in box)	
	Shef Erasers No. 435 (25 in box)	
	Eads Pencil Erasers 98078 (15 in box)	
	Wood Ruler (10 in box)	
	School Glue, 285-B, (4 f. oz.)	
	MCB Pencils No. 267-2½ (20 in box)	
	Flag Felt Tip Pen (Black) #84300 (10 in box)	
	Flag Felt Tip Pen (Blue) 843-04 (10 in box)	
	Greeting Cards 06-9100 (10 in box)	
	T-Shirt Moon Beams (Brand Name)	
	T-Shirt Velvet Crush (Brand Name)	
	T-Shirt "Have a Nice Day" 23081	
	White Tube Socks with Blue Stripe 01-3862	
	Direct Aid Hand Lotion 382-0 (6 f. oz.)	
	Shampoo #8232 (2 f. oz. bottles)	

Instructor's Final Checklist

ORDERING MERCHANDISE BY REQUISITIONS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In filling out a purchase requisition, the student:

	Accomplished	Not Accomplished
1. Filled out the proper spaces on the requisition...........	[ ]	[ ]
2. Entered the list of goods without error...................	[ ]	[ ]

IDENTIFYING WAREHOUSE EQUIPMENT

OBJECTIVES

GIVEN pictures of five pieces of warehouse equipment,

GIVE THE NAME OF EACH PIECE OF EQUIPMENT, AND TELL HOW IT IS USED IN THE WAREHOUSE.

YOU SHOULD give the correct name and use of each piece of equipment.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that any person who operates warehouse equipment is responsible for operating it in a safe manner.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. RECOGNIZING WAREHOUSE EQUIPMENT	1
Instructor's Final Checklist	
IDENTIFYING WAREHOUSE EQUIPMENT	4

CHECK-OUT ACTIVITIES

Your teacher will provide pictures of warehouse equipment.

Give the name of each piece of equipment and tell how it is used in the warehouse.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read and study the pictures in Instruction Sheet I. Discuss the name of each piece of equipment, and talk about how it is used in the warehouse.	Instruction Sheet I	
2	Have the class identify pieces of warehouse equipment, such as dollies, used in the school.		
3	Arrange for the class to see a demonstration of the operation of a piece of warehouse equipment. Invite a school maintenance person to demonstrate how to operate a piece of equipment (option). Arrange a field trip to a warehouse where equipment is being used to transport the merchandise (option).		
4	Duplicate a copy of the Check-Out Activity Sheet for each student. Have him/her name each piece of warehouse equipment and tell how it is used. Use the Answer Key to check the students' answers. Use the Instructor's Final Checklist to evaluate each student's work.	Check-Out Activity Sheet (Master Copy in this section.) Instructor's Final Checklist	

Instructor's Final Checklist

IDENTIFYING WAREHOUSE EQUIPMENT

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In identifying warehouse equipment, the student:

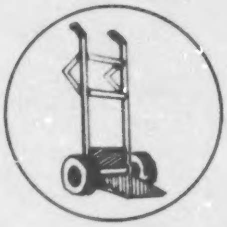
	Accomplished	Not Accomplished
1. Gave the correct name of each piece of equipment..........	[ ]	[ ]
2. Explained the correct use of each piece of equipment......	[ ]	[ ]

Check-Out Activity

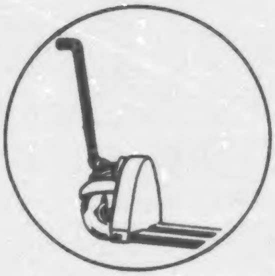
IDENTIFYING WAREHOUSE EQUIPMENT

Give the name of each piece of warehouse equipment below, and tell how it is used in the warehouse. USE YOUR OWN PAPER.

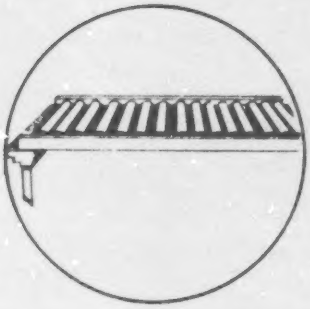
1.



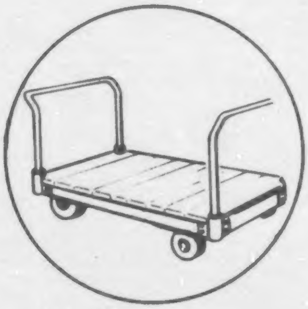
2.



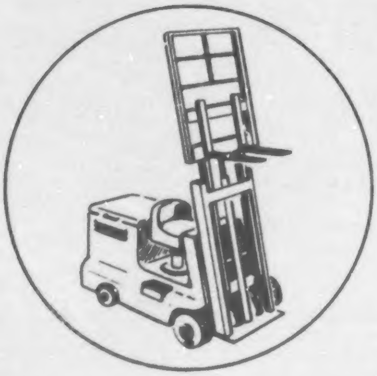
3.



4.



5.



ANSWER KEY

Check-Out Activity
IDENTIFYING WAREHOUSE EQUIPMENT

1. Two-wheel dolly. It is loaded by hand and pushed to the proper area in the warehouse.
2. Lift jack. It is manually operated to pick up and transport pallets loaded with merchandise.
3. Roller-conveyor. It is placed at an angle so that merchandise can be rolled down it.
4. Four-wheel dolly. It is loaded by hand and pushed to the proper area in the warehouse.
5. Forklift. It is mechanically operated to pick up and transport pallets loaded with merchandise.

CHECKING IN MERCHANDISE

OBJECTIVES

GIVEN an order of merchandise and an invoice,

CHECK IN THE MERCHANDISE.

YOUR WORK will be rated in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--The student will understand that carefully checking any order of merchandise received can often save the store money.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. READING AN INVOICE	1
II. CHECKING IN MERCHANDISE	2
Student Self-Check	
I. CHECKING IN MERCHANDISE	4
Instructor's Final Checklist	
CHECKING IN MERCHANDISE	5

CHECK-OUT ACTIVITIES

Your instructor will provide an order of merchandise and an invoice.

Check in the merchandise.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class study the invoice in Instruction Sheet I. Discuss each part of the invoice. Be sure that students understand "Unit Price," the price of one item listed. The "Total" is figured by multiplying the Unit price by the Quantity.	Instruction Sheet I	
2	Have the class read Instruction Sheet II. Discuss each of the steps for checking in an order of merchandise.	Instruction Sheet II	
3	Demonstrate for the class how to check in an order of merchandise. Follow this procedure: (1) Prepare a small order of merchandise. You may use any school supplies you have on hand. Include at least one damaged item. (2) Prepare a transparency of an invoice listing the items you are using; or draw the invoice on the chalkboard. Provide for discrepancies in invoice. (3) Demonstrate how to check in each item of merchandise, following the procedures listed in Instruction Sheet II.	An order of merchandise and a corresponding invoice (Master Copy of a blank invoice is in this section). Optional: Transparency Marking pen Overhead projector	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Provide each student a copy of the first page of Student Self-Check I, and have him/her complete it. Answers can be checked on p. 2 of the Student Self-Check. When students have finished the exercise, discuss why and how each item of merchandise is checked in.	Student Self-Check I (Master Copy is in this section).	
5	For the Check-Out Activity, set up several merchandise receiving stations in the classroom. For each station provide an order of merchandise and invoice(s) similar to those you prepared in Learning Activity 3. Assign a group of students to each station. Each group may complete this activity in one of two ways: (1) each student in the group may check in the merchandise and turn in an invoice; or (2) the group may check in the merchandise and turn in only one invoice. Use the Instructor's Final Checklist to rate each invoice.	Orders of merchandise and corresponding invoices Instructor's Final Checklist	

Master Copy

Task Assignment Sheet PA-MD-14

SCHOOL STORE SUPPLIES
102 PLAZA PARK
BOONE, KY 40401

Date: ____________________

Invoice Number: ________________

Purchase Order Number: ___________

Terms: ________________________

Sold To: ______________________

Ship To: ______________________

Quantity	Description	Unit Price	Total
GRAND TOTAL			

Shipped By: ___________________

Date Shipped: __________________

INVOICE

Quantity	Description	Unit Price	Total

Student Self-Check I

CHECKING IN MERCHANDISE

Your instructor will provide a copy of this page. Do not write on this page. Check in the order of merchandise listed below. When you have finished check your invoice with the one on the next page.

MERCHANDISE RECEIVED

Item	Description	Quantity
Ball point pens	blue	2 boxes
Colored pencils		3 boxes
T-shirts	white	12
Sweat shirts	blue	5 (1 shirt has torn sleeve)

INVOICE

Quantity	Description	Unit Price	Total
2 boxes	Ball point pens, blue	1.00	2.00
5 boxes	Colored pencils	.50	2.50
10	T-shirts, white	2.00	20.00
5	Sweat shirts, gray	4.00	20.00
GRAND TOTAL			44.50

Received by: ____________________ Date ____________

Instructor's Final Checklist

CHECKING IN MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In checking in merchandise received, the student's invoice included:

	Accomplished	Not Accomplished
1. A check mark by each item that agreed in description and quantity with merchandise received	☐	☐
2. A description of the error, by any item found to be in error	☐	☐
3. A description of any damaged merchandise	☐	☐
4. The student's signature	☐	☐
5. The date the student checked in the merchandise	☐	☐

STORING MERCHANDISE

OBJECTIVE

GIVEN a storage area, merchandise, and bin tickets,

STORE THE MERCHANDISE.

YOU WILL BE RATED according to the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that storing merchandise so that it is easily accessible saves time and money.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. STORING MERCHANDISE	1
II. FILLING OUT A BIN TICKET	3
Instructor's Final Checklist	
STORING MERCHANDISE	5

CHECK-OUT ACTIVITIES

Your teacher will provide a supply of merchandise and a bin ticket.

Store the merchandise in the storage area.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I. Discuss the steps in storing merchandise.	Instruction Sheet I	
2	Demonstrate how to store merchandise following the steps given in Instruction Sheet I.	Storage shelf or table Merchandise Dolly (if necessary) Bin ticket	
3	Have the class read Instruction Sheet II. Discuss the parts of the bin ticket that must be completed when storing merchandise.	Instruction Sheet II	
4	Divide the class into small groups. Provide each group with a bin ticket. Assign each group to a specific shelf section and have them fill out a bin ticket. You may have students construct a display of the completed bin tickets.	Bin tickets (Master Copy is in this section.) Stored merchandise (with stock number) Storage shelf marked with bin (shelf section) number and location (aisle and shelf) number	
5	Duplicate a bin ticket for each student. Provide each student one kind of merchandise. (If you have a large class, you may want to assign one item per student.) Have him/her store the merchandise and fill out a bin ticket.	Articles of merchandise (with stock number) Storage area (marked with bin and location numbers) Dolly (if necessary) Bin tickets	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Use the Instructor's Final Checklist to rate each student's performance.	Instructor's Final Checklist	

BIN TICKET

BIN ____________________ LOCATION ____________

STOCK NO. ______________________________

ARTICLE ________________________________

STOCK MINIMUM __________________________

STARTING INVENTORY	ISSUED	ADDED	ON HAND

Instructor's Final Checklist

STORING MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In storing merchandise, the student:

	Accomplished	Not Accomplished
1. Moved the merchandise in the best way	☐	☐
2. Stored the merchandise in the correct section of the storage area	☐	☐
3. Stored like goods together	☐	☐
4. Rotated the merchandise (when necessary)	☐	☐
5. Filled out a bin ticket correctly:		
a. Bin number	☐	☐
b. Location	☐	☐
c. Stock number	☐	☐
d. Article	☐	☐
e. Stock minimum	☐	☐
f. Starting inventory	☐	☐

CODING AND PRICE MARKING MERCHANDISE

OBJECTIVE

GIVEN merchandise, cost and selling price of the merchandise, a code word, and price-marking tools and supplies,

CODE AND PRICE MARK THE MERCHANDISE.

THE CODES should correspond to the cost of the merchandise. THE PRICES should correspond to the selling price of the merchandise. THE MARKING should be, neat, legible, permanent, and cause no damage to the merchandise.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will become aware of the importance of neatness and legibility in recording information to be used for future reference.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. CODING AND PRICE MARKING	2
Student Self-Check	
I. CODING AND PRICE MARKING	4
Instructor's Final Checklist	
CODING AND PRICE MARKING MERCHANDISE	5

CHECK-OUT ACTIVITIES

Your instructor will provide the following: items of merchandise, cost and selling price of the merchandise, a code word, and price marking tools and supplies.

Price mark and code each item of merchandise.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Ask students to bring items to class that have been price marked. Have the class compare the various devices used--tickets; gummed labels; tags boxes that have been marked with grease pencils; jars and cans that have been marked with ink stamps, etc. Also, have the class compare the various markings used.	Items with price markings	
2	Have students read Instruction Sheet I. Discuss thoroughly how to use a coding system.	Instruction Sheet I	
3	Demonstrate to the class how to code and price mark several items of merchandise. You may follow this procedure: (1) Obtain several different kinds of merchandise; e.g., an article of clothing on a hanger, a box, and a package of plastic wrapped merchandise. (2) Make a price tag from cardboard and attach a string. A file folder label can serve as gummed labels. (3) On the chalkboard write the cost and selling price of each item of merchandise and the code word	Several items of merchandise Price tags with strings Gummed labels Grease pencil Ink pen	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
3	you will use. You may choose to use the code word WASHINGTOP that is used in Instruction Sheet I. (4) Code and price mark each item: a. Use an ink pen to mark the price tag. Attach it by the string to the article of clothing. b. Use the grease pencil to mark the box. c. Use the ink pen to mark the gummed label. Stick the label on the package of plastic wrapped merchandise.		
4	Have students complete the problems in Student Self-Check I.	Student Self-Check I	
5	Set up coding and price marking stations in the classroom. For each station provide the kinds of supplies you used for your demonstration in Learning Activity 3. Assign groups of students to each station. Have them code and price mark the merchandise provided. Use the Instructor's Final Checklist to rate each group's work.	Items of merchandise price-marking tools and supplies Instructor's Final Checklist	

Instructor's Final Checklist

CODING AND PRICE MARKING MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In coding and price marking merchandise, the student:

	Accomplished	Not Accomplished
1. Coded each item of merchandise to correspond to the cost of the item	☐	☐
2. Price marked each item of merchandise to correspond to the selling price of the item	☐	☐
3. Marked each price tag:		
a. Neatly	☐	☐
b. Legibly	☐	☐
c. With permanent marking	☐	☐
4. Caused no damage to the merchandise	☐	☐

STOCKING SHELVES AND TABLES

OBJECTIVE

GIVEN coded and price-marked merchandise, shelves and/or tables,

STOCK THE SHELVES AND/OR TABLES WITH THE MERCHANDISE.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that neat, clean, well arranged displays often encourage customers to buy the merchandise.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. STOCKING SHELVES AND TABLES	1
Instructor's Final Checklist	
STOCKING SHELVES AND TABLES	4

CHECK-OUT ACTIVITIES

Your instructor will provide coded and price-marked merchandise and shelves and/or tables.

Stock the shelves and/or tables with the merchandise.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students read Instruction Sheet I. Discuss each step in stocking shelves and tables.	Instruction Sheet I	
2	Demonstrate to the class how to stock a shelf or table. Follow the steps listed in Instruction Sheet I.	Shelf or table containing items of merchandise to represent older merchandise Price-marked merchandise to represent new merchandise (Items coded and price marked in Task Assignment Sheet PA-MD-16 can be used.) Dust cloth	
3	Set up stocking stations in the classroom. Assign a group of students to each station. Have each group practice stocking as the students critique each other.	Same supplies as listed above for each work station	
4	Have students at each stocking station (see Learning Activity 3) stock the shelves and/or table for the Check-Out Activity. Use the Instructor's Final Checklist to rate each group's work.	Same supplies as used in Learning Activity 3 Instructor's Final Checklist	

Instructor's Final Checklist

STOCKING SHELVES AND TABLES

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The newly stocked shelves and/or tables:

	Accomplished	Not Accomplished
1. Were free of dust	[ ]	[ ]
2. Displayed new merchandise toward the back	[ ]	[ ]
3. Displayed older merchandise toward the front	[ ]	[ ]
4. Displayed the same kinds of merchandise together	[ ]	[ ]
5. Displayed prices so they could be easily seen	[ ]	[ ]
6. Were not overstocked	[ ]	[ ]
7. Displayed all items in a neat manner	[ ]	[ ]

MAKING SHOW CARDS

OBJECTIVES

GIVEN a felt-tip pen, cardstock, and a list of store services, merchandise, and prices,

HAND LETTER ONE SHOW CARD IN GOTHIC STYLE.

YOUR SHOW CARD will be rated in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will recognize that good show cards help save the salesperson valuable time by providing pertinent information to customers.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. SHOW CARDS	1
II. THE GOTHIC ALPHABET AND NUMERALS	2
III. SPACING LETTERS AND NUMERALS	3
IV. MAKING SHOW CARDS	4
Instructor's Final Checklist	
MAKING SHOW CARDS	5

CHECK-OUT ACTIVITIES

Your instructor will provide a felt-tip pen, cardstock, and a list of store services, merchandise, and prices.

Make one show card.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class review the examples of show-cards in Instruction Sheet I. As a class, for each show-card identify the information provided the customer.	Instruction Sheet I	
2	Have the class study the Gothic alphabet and numerals in Instruction Sheet II. Have students practice the basic strokes.	Instruction Sheet II Paper Wide felt-tip pens	
3	Have the class study the two kinds of spacing between letters--visual and equal space. Have students practice hand lettering a word using the Gothic style. When they have finished, check their work to insure that the letters are acceptably drawn and spaced.	Instruction Sheet III Paper Wide felt-tip pens	
4	Prepare a list of ideas for show cards for merchandise and services offered by your school store. Have students plan the layout for a show card. Any lettering should be done lightly in pencil.	Cardstock (preferred) Pencils List of ideas for show cards Magazines to be used for clipping pictures Scissors	
5	Have students complete the show card planned in Learning Activity 4 by inking in the lettering and adding any art work that was planned.	Show card layouts prepared in Learning Activity 4. Wide felt-tip pens Glue	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Use the Instructor's Final Checklist to rate each show card.	Instructor's Final Checklist	

Instructor's Final Checklist

MAKING SHOW CARDS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's show card:	Accomplished	Not Accomplished
1. Was eye-catching	[ ]	[ ]
2. Was easy to read	[ ]	[ ]
3. Could be read quickly	[ ]	[ ]
4. Had all words spelled correctly	[ ]	[ ]
5. Had all amounts correct (if applicable)	[ ]	[ ]
6. Was clean and neat	[ ]	[ ]
7. Satisfied the purpose for which it was intended	[ ]	[ ]

SETTING UP COUNTER/TABLE-TOP DISPLAYS

OBJECTIVE

GIVEN a display counter or table, merchandise, an approved plan, and other display supplies,

SET UP A COUNTER OR TABLE-TOP DISPLAY.

YOUR DISPLAY WILL BE RATED in accordance with your approved plan.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will become aware of the usefulness of careful planning before tackling a detailed task.

CONTENTS OF MODULE

Instructor's Final Checklist	Learning Activity Number
SETTING UP COUNTER/TABLE-TOP DISPLAYS	6

CHECK-OUT ACTIVITIES

Set up the display which you planned in Learning Activity 4.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class look through magazines and newspapers to find advertisements, photographs, or illustrations that immediately get the attention. Allow time for a sharing session.	Magazines and newspaper Scissors	
2	Prepare a handout or a transparency on "How to Construct a Display." Explain that these are the four phases a merchandise displayer goes through in order to construct an eye-catching, appealing display of merchandise.	Transparency Master #1, "How to Construct a Display" (Masters of transparencies in this section.)	
3	Divide the class into small groups. Have each group develop a plan for a display. You may follow this procedure for each group:		
	(1) Provide each student a display planning sheet or have him/her make one.	Handout #1, "Display Guide of Annual Events" (Master copy is in this section.)	
	(2) Help students choose a display theme. Prepare a handout or a transparency showing ideas for displays. Have them enter it on the planning sheet.	Transparency Master #2 "Display Guide of Annual Events"	
	(3) Help students identify the merchandise they will use for the display and list it on the planning sheet.		

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	(4) To help students select an appropriate display arrangement pattern, prepare a handout or transparency of the five basic patterns. Have them enter the pattern name on the planning sheet.	Transparency Master #3 "Display Arrangement Patterns"	
	(5) Help students identify any accessories they will use to enhance the appearance of the merchandise. Accessories may consist of the following: burlap, wood, stone, paper, straw, glass, ribbon, artificial flowers, special lighting, etc. Have them list the accessories on the planning sheet.		
	(6) Help students identify props to be used. (Props are fixtures used to support or hold the merchandise so that it is displayed in an attractive manner.) Examples of props are: panels, screens, pedestals, shelves, small tables, cubes, columns, etc. Have them list the props on the planning sheet.		

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	(7) Have students identify the show cards they will use and list them on the planning sheet. When the planning sheet is completed, have each group make a pencil sketch of the proposed display. Check each plan and sketch to see that it is complete and workable.	Show cards made in Task Assignment Sheet PA-MD-18.	
4	Develop transparencies for the steps in preparing a display after the plan has been completed. Give an illustrated talk. You may use the narration outline in preparing your presentation.	Transparency Masters #4-13 (Masters and outline for narration in this section.)	
5	Prepare transparencies of the displays illustrated. Have students identify: themes, merchandise, arrangement patterns, accessories (if any), props, and related groupings of merchandise.)	Transparency Masters #14-18	
6	Provide display space and a counter or table for each of the groups established in Learning Activity 3. Assure that they have the necessary supplies. When	Display plan Merchandise identified Accessory supplies Prop materials Tools (if necessary) Show cards made in Task Assignment Sheet PA-MD-18	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	necessary, allow time for making props and accessories. Have each group construct a display based on its display plan. Use the Instructor's Final Checklist to rate each display.	Brooms and dust cloths (if necessary) Counters and tables Display space Instructor's Final Checklist	

Instructor's Final Checklist

SETTING UP COUNTER/TABLE-TOP DISPLAYS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The students' display was set up according to their approved plan:

	Accomplished	Not Accomplished
1. Theme	[ ]	[ ]
2. Merchandise	[ ]	[ ]
3. Arrangement pattern	[ ]	[ ]
4. Accessories	[ ]	[ ]
5. Props	[ ]	[ ]
6. Show cards	[ ]	[ ]

Master Copy for Learning Activity 3

Task Assignment Sheet PA-MD-19

DISPLAY PLANNING SHEET

Theme	Merchandise	Arrangement Pattern	Accessories	Props	Show Cards

Narration Outline for Learning Activity 4

"HOW TO CONSTRUCT A DISPLAY"

(Transparency Masters #4-13)

When a display plan has been written and sketched, follow this procedure to construct the actual display:

Transparency # 4: Look over the display area to determine the amount of merchandise and the number and size of props and accessories needed.

Transparency # 5: Make the necessary props, accessories, and show cards.

Transparency # 6: Here are some examples of some simple props.

Transparency # 7: When everything is ready for the display, thoroughly clean the display area.

Transparency # 8: Begin constructing the display by putting up large accessories. Small accessories often may be added as a "final touch."

Transparency # 9: Arrange the props in the display area.

Transparency #10: Collect the appropriate merchandise to be displayed.

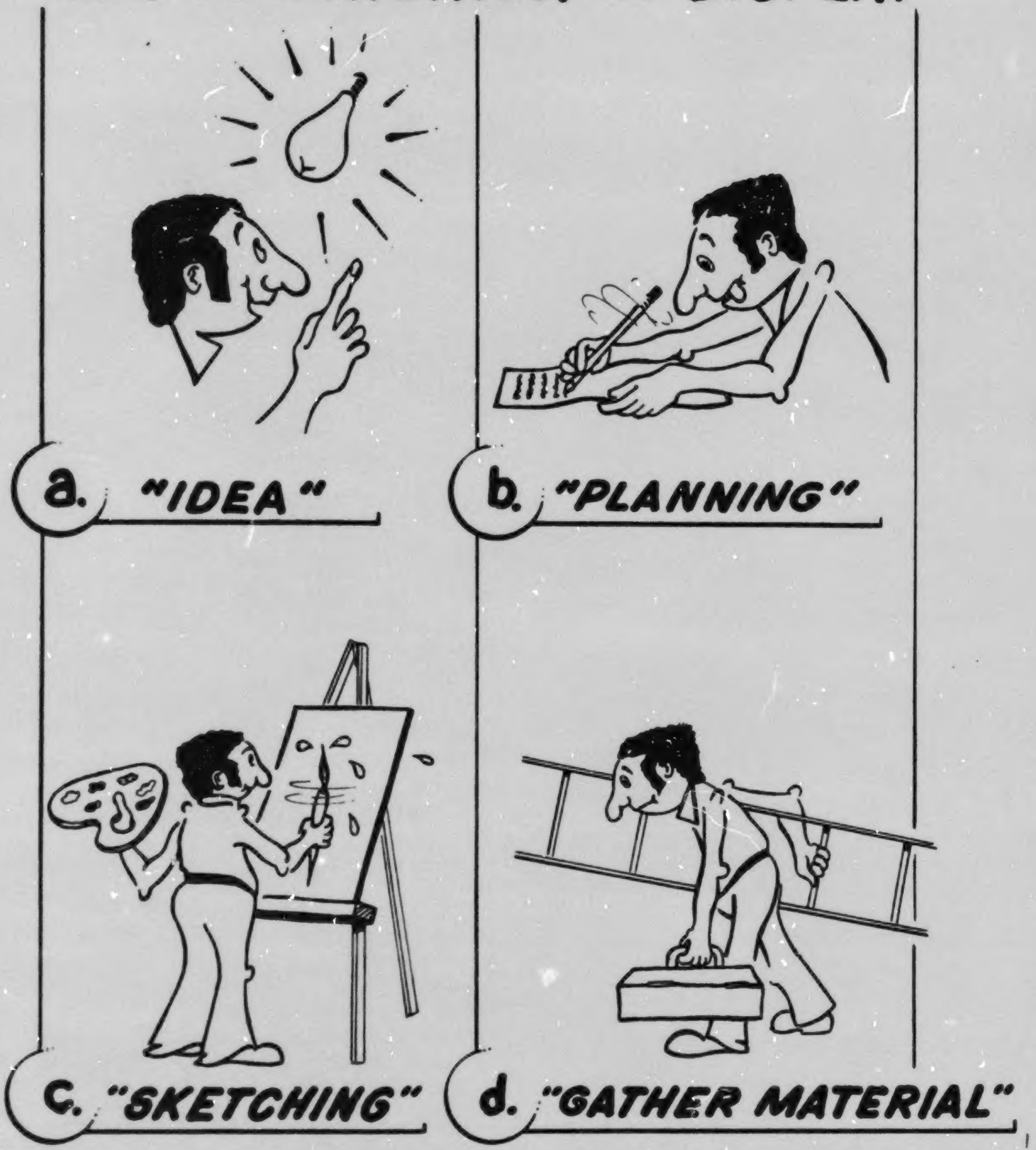
Transparency #11: Arrange the merchandise in the display area. Notice that the same kinds of goods are placed together.

Transparency #12: Add the show cards in the appropriate places. Be sure they are arranged so that customers can easily see them.

Transparency #13: When the display is finished, look it over with a critical eye. When necessary, make any changes that will make the display more attractive.

Transparency Master #1

HOW TO CONSTRUCT A DISPLAY


a. "IDEA"
b. "PLANNING"
c. "SKETCHING"
d. "GATHER MATERIAL"

Transparency Master #2

DISPLAY GUIDE OF ANNUAL EVENTS

JANUARY
WHITE SALE

- White Goods
- Winter Vacation
- Pre-inventory sale
- Clearance Sale

- Lincoln's Birthday
- Washington's Birthday
- Valentine's Day
- Boy Scout Anniversary

- Spring
- St. Patrick's Day
- House Cleaning Sale
- National DECA Month

- All Fool's Day
- Easter
- Baseball Season
- April Showers
- Clean-up and Paint-up
- Fixup Week

- Mother's Day
- Outdoor Furniture
- Bridal Gowns
- Wedding Gifts
- Garden Tools
- Memorial Day

- Summer
- Father's Day
- Graduation
- Summer Apparel
- Fur Storage
- Camp and Vacation Needs

- Independence Day
- Beach Wear
- Sporting Goods
- Cameras and Films
- Travel Needs
- Mid-Year Clearance

AUGUST
Back to School

- Summer Clearance
- August Fur Sale
- Back-to-School
- Fall Fabrics
- August Furniture Sale

- Labor Day
- School Needs
- Fall Fashions
- Children's Apparel
- Yard Goods

- Columbus Day
- Halloween
- National Apple Week
- Major Appliances
- Hunting Season
- Home Furnishing

NOVEMBER
VOTE

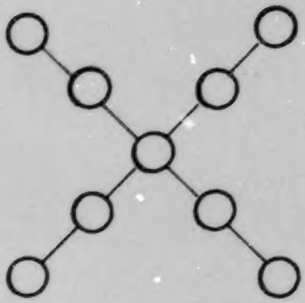
- Election Day
- Armistice Day
- Thanksgiving Day
- American Education Week
- Cold Weather Apparel
- Christmas Merchandise

DECEMBER
29 30 31

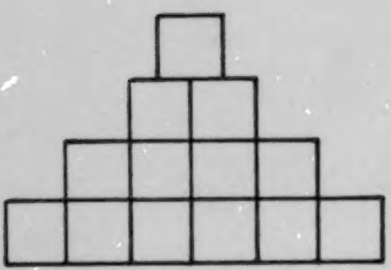
- First Day of Winter
- Christmas Gifts
- Toys
- Post-Christmas Sale
- New Years Eve

Transparency Master #3

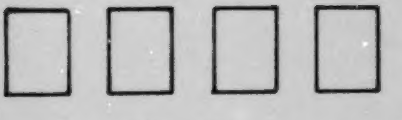
ARRANGEMENT PATTERN FOR DISPLAY



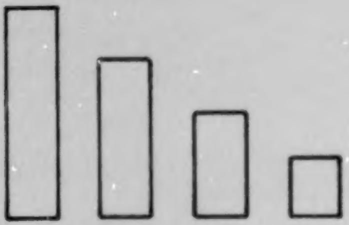
Radiation



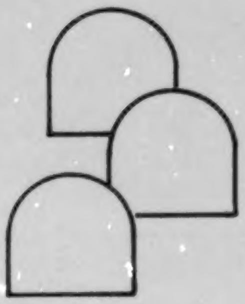
Pyramid



Repetition

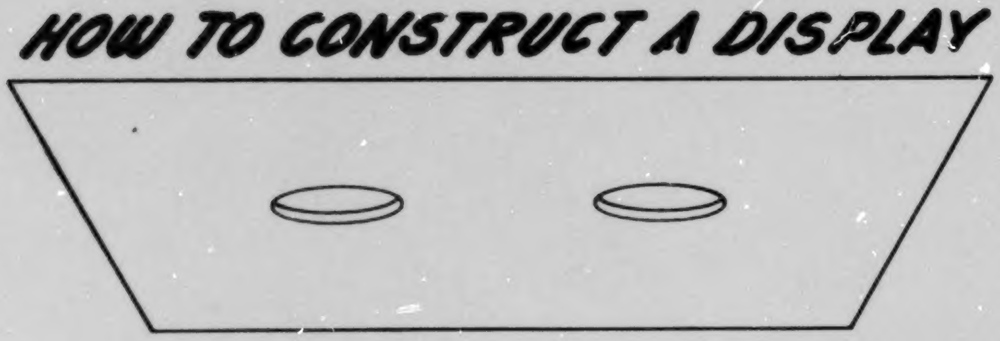


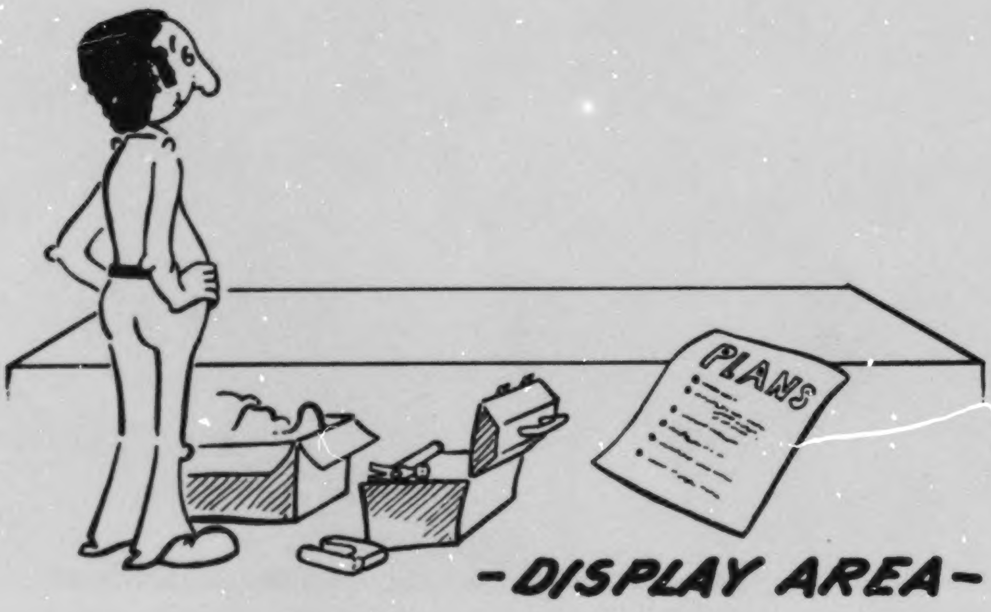
Step



Zig-Zag

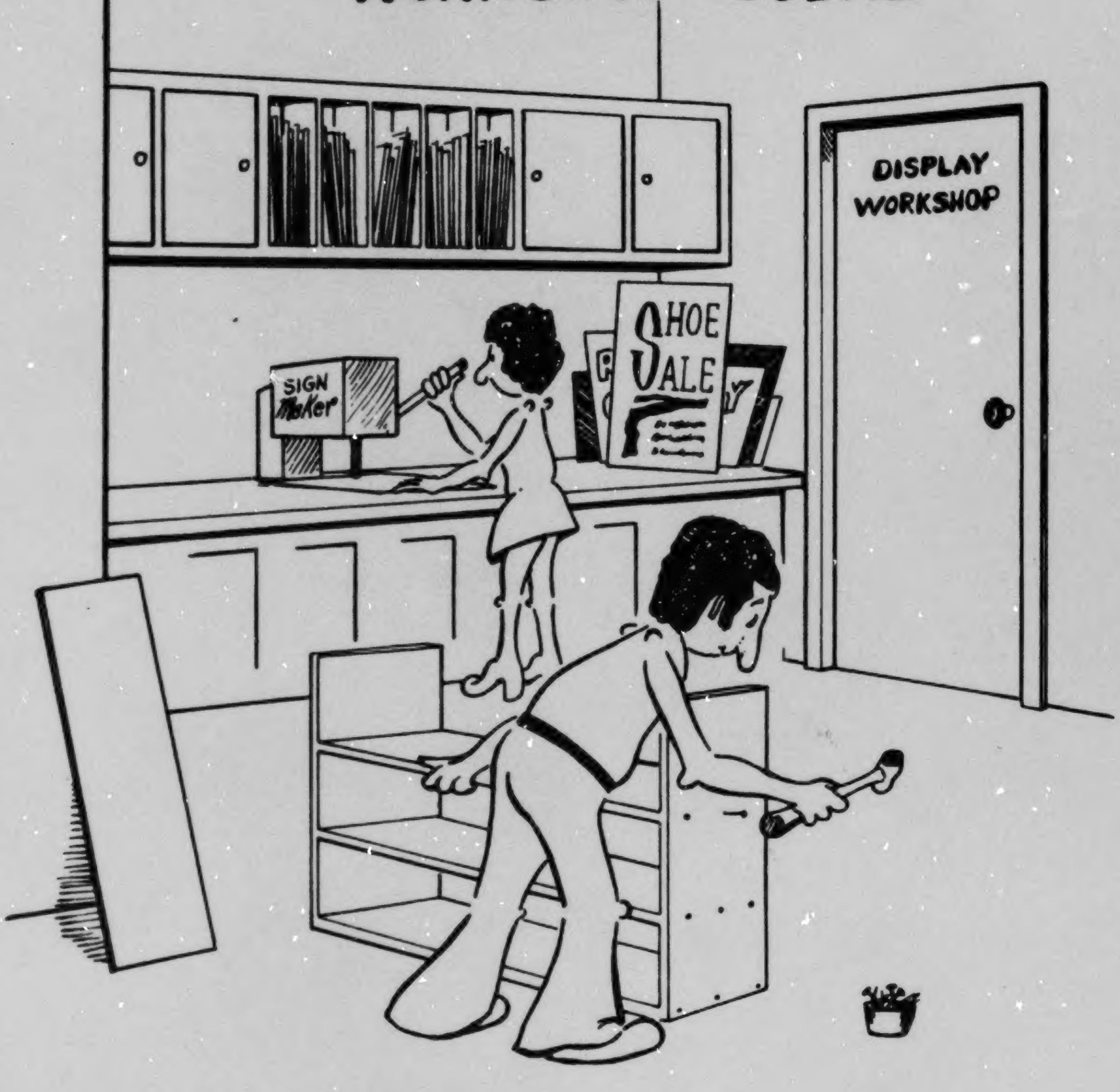
Transparency Master #4


HOW TO CONSTRUCT A DISPLAY

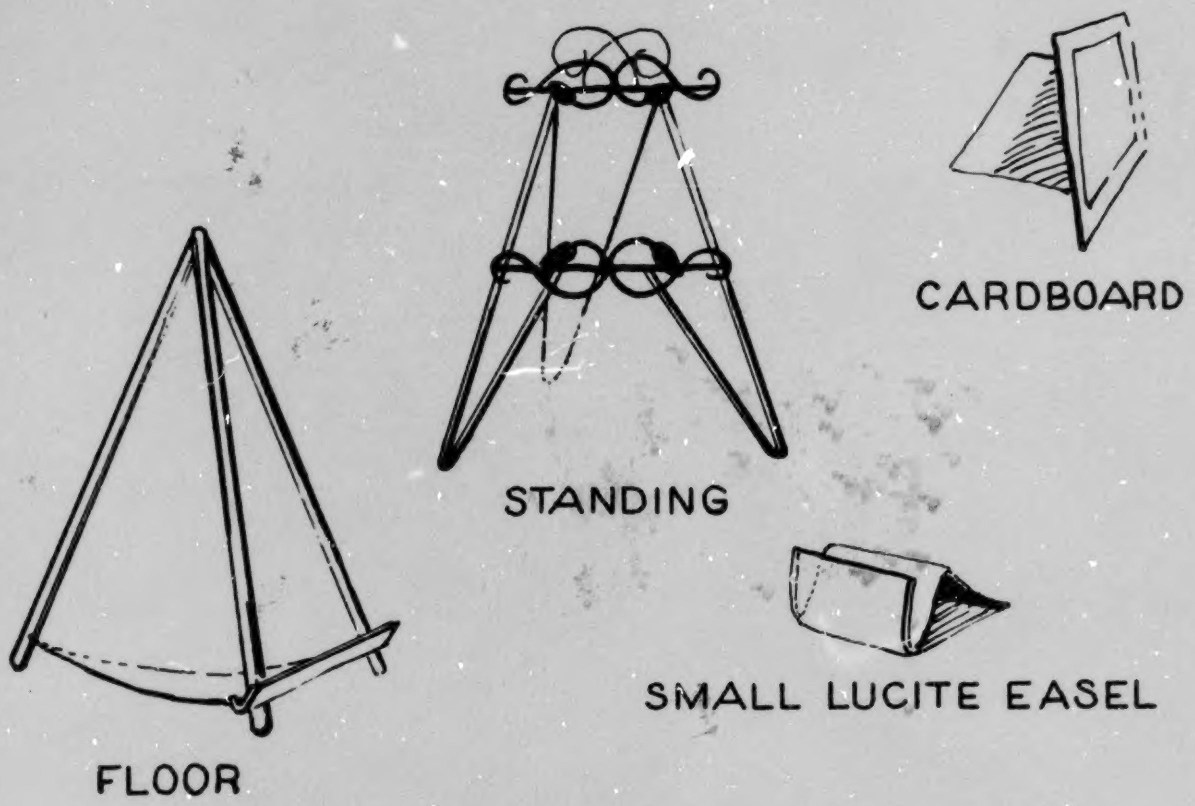

PLANS
-DISPLAY AREA-

Transparency Master #5

HOW TO CONSTRUCT A DISPLAY "WORKSHOP SCENE"


DISPLAY WORKSHOP
SHOE SALE
SIGN Maker

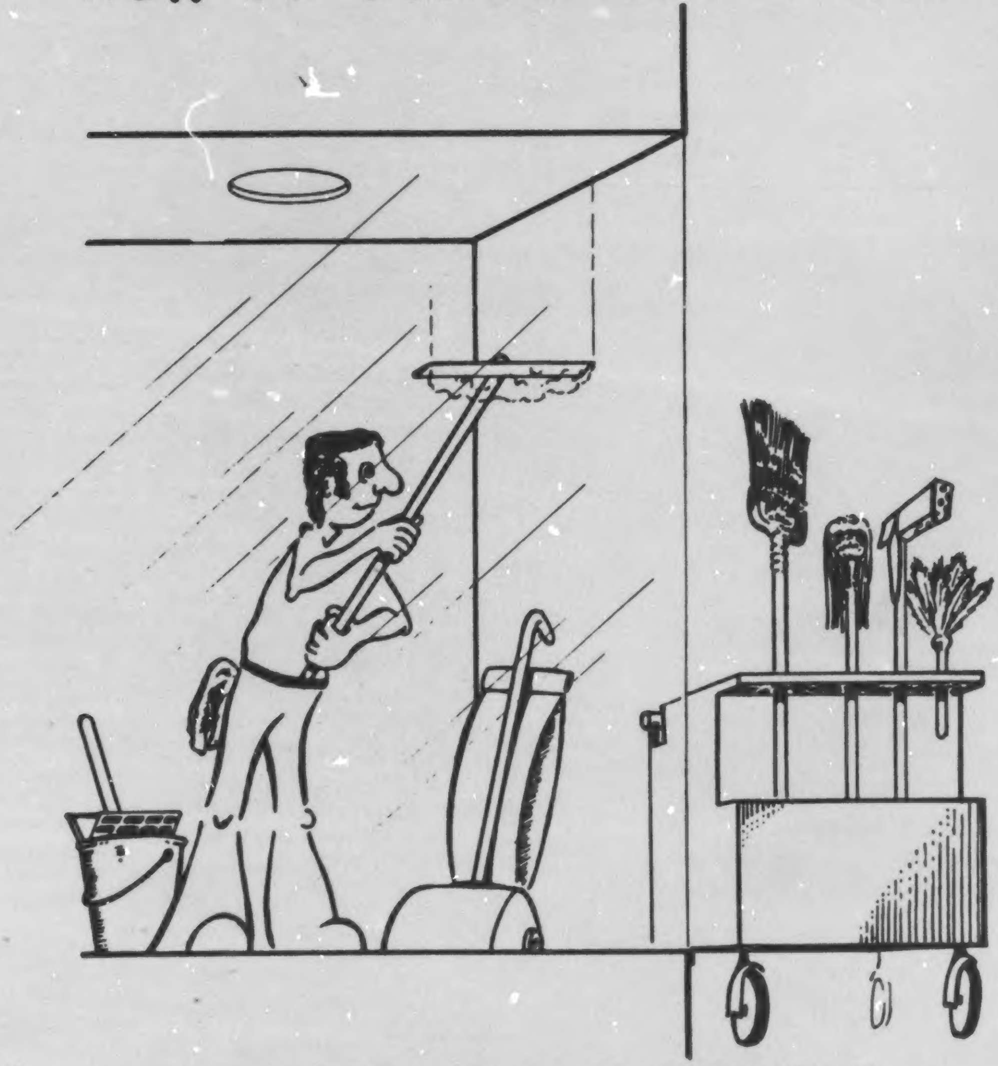
Transparency Master #6


STANDING
CARDBOARD
SMALL LUCITE EASEL
FLOOR

EASEL SIGN HOLDERS

Transparency Master #7

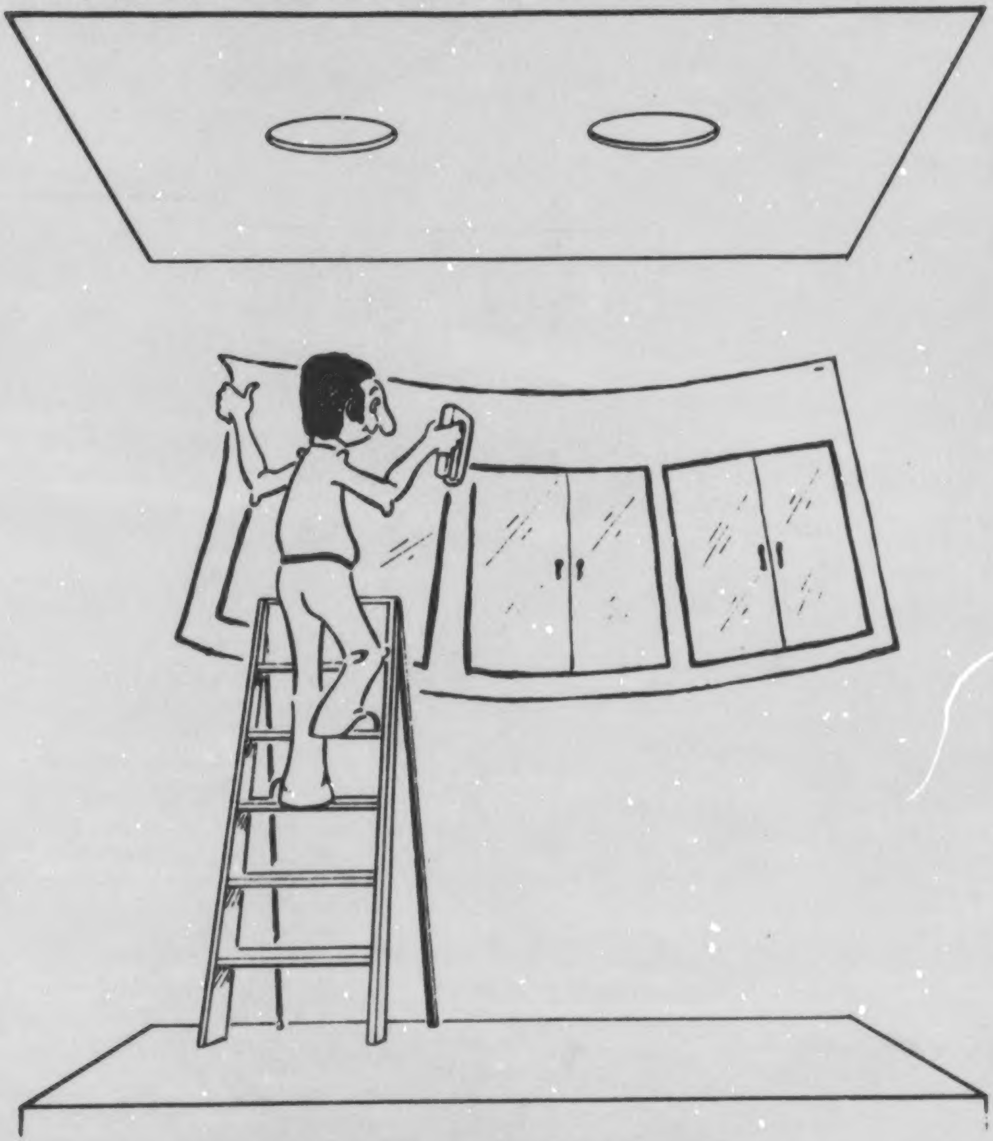
HOW TO CONSTRUCT A DISPLAY



"HOUSE CLEANING"

Transparency Master #8

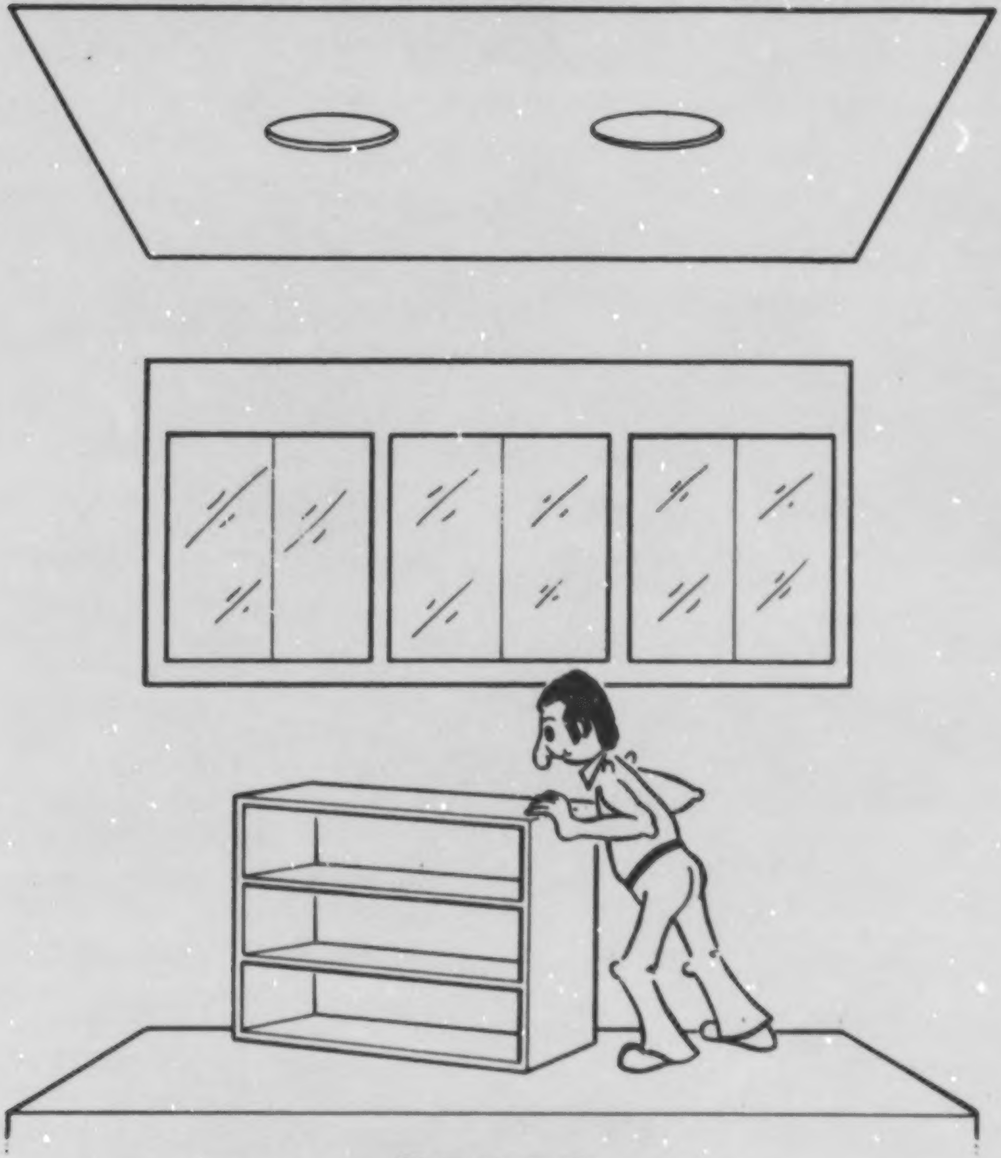
HOW TO CONSTRUCT A DISPLAY



ACCESSORIES

Transparency Master #9

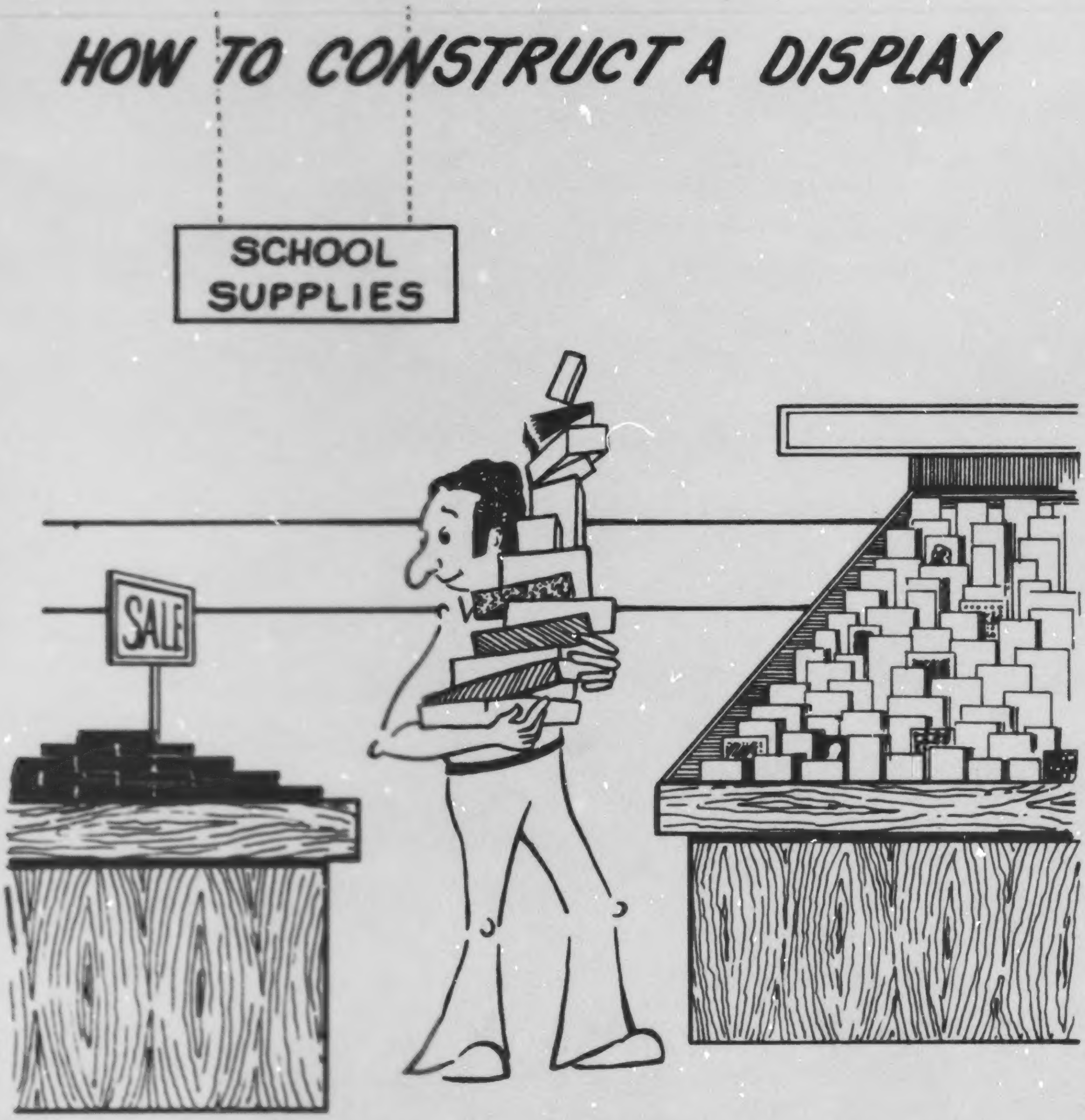
HOW TO CONSTRUCT A DISPLAY



-PROPS-

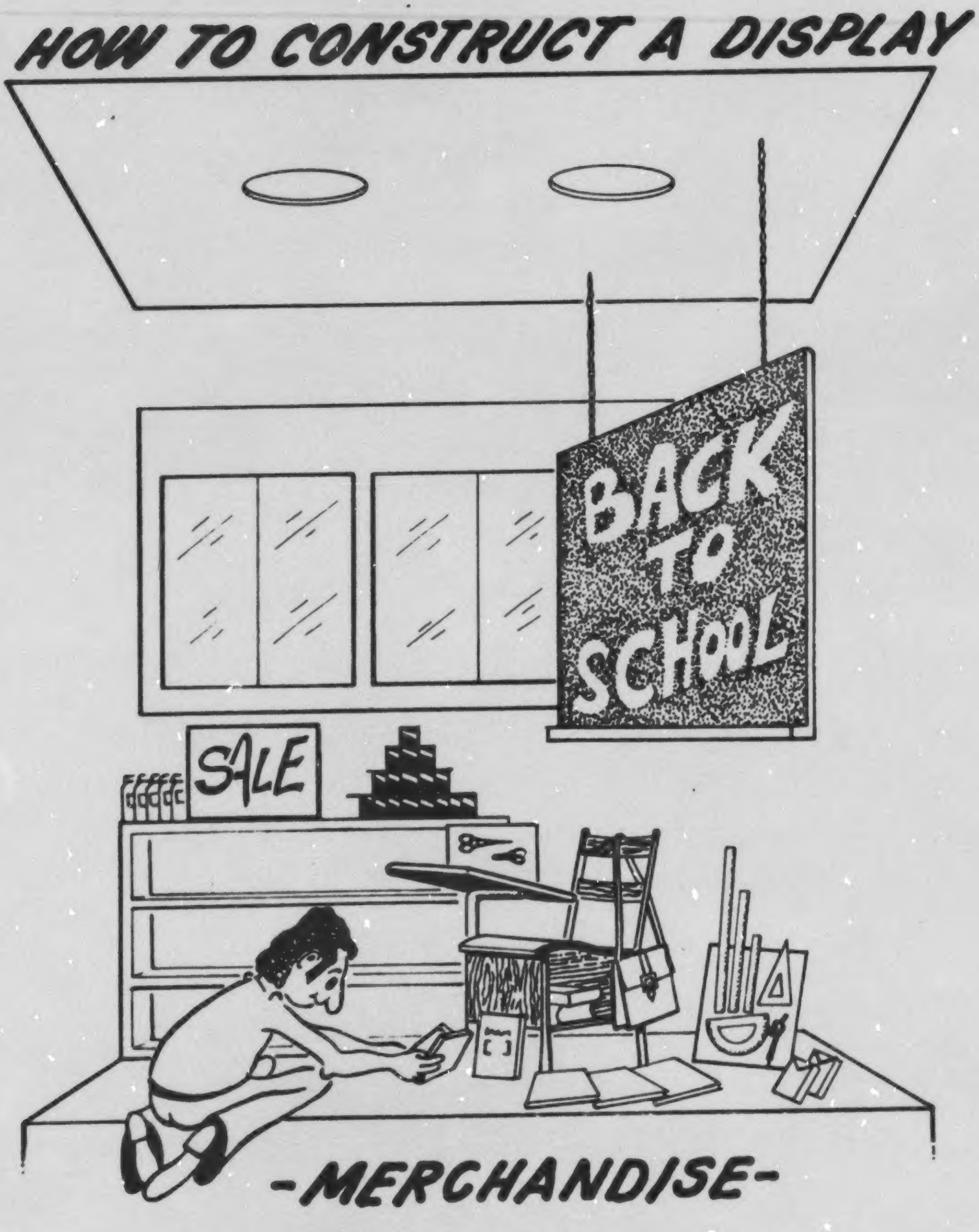
Transparency Master #10

HOW TO CONSTRUCT A DISPLAY

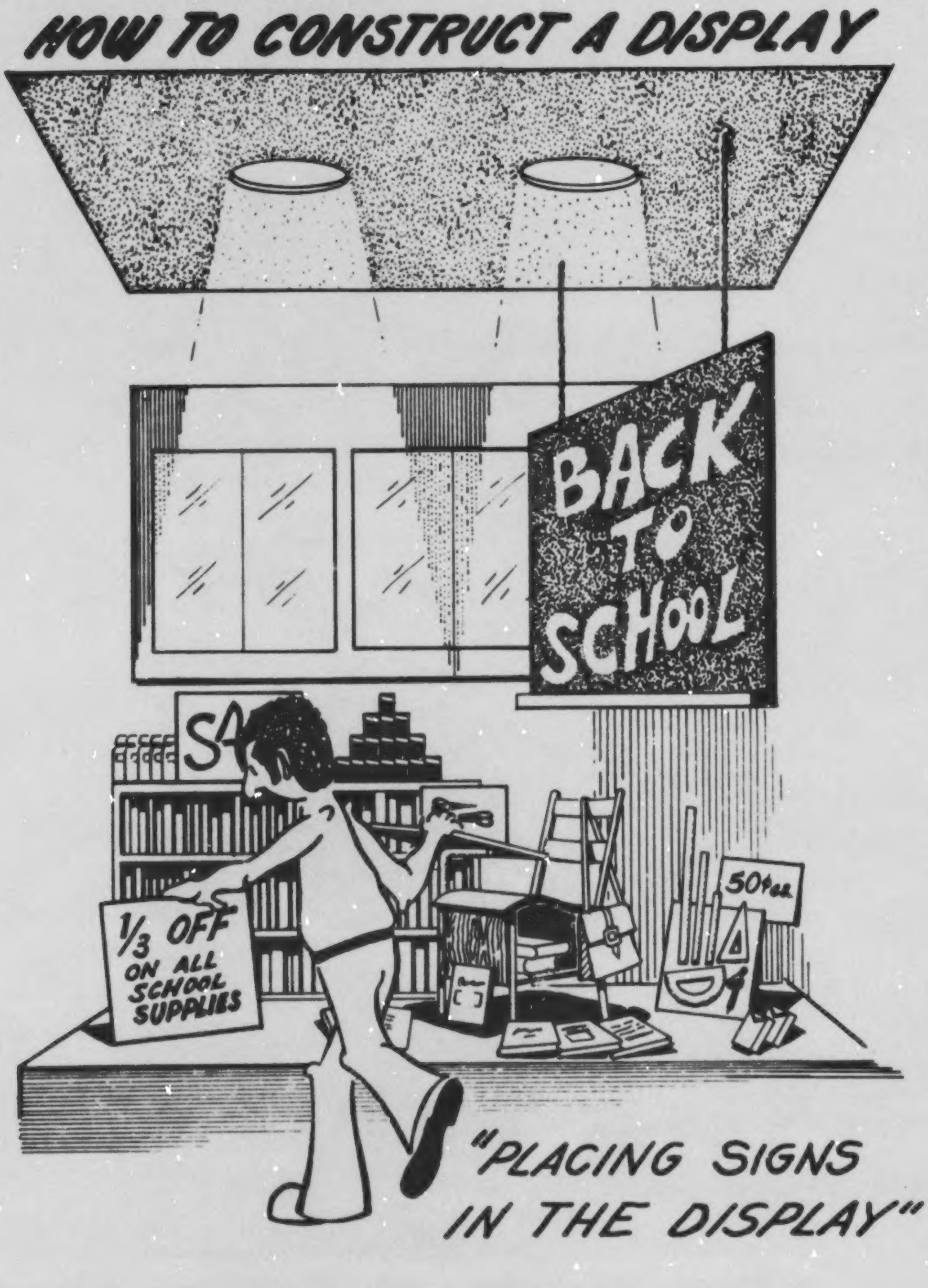

SCHOOL SUPPLIES
SALE

"COLLECTING MERCHANDISE FOR DISPLAY"

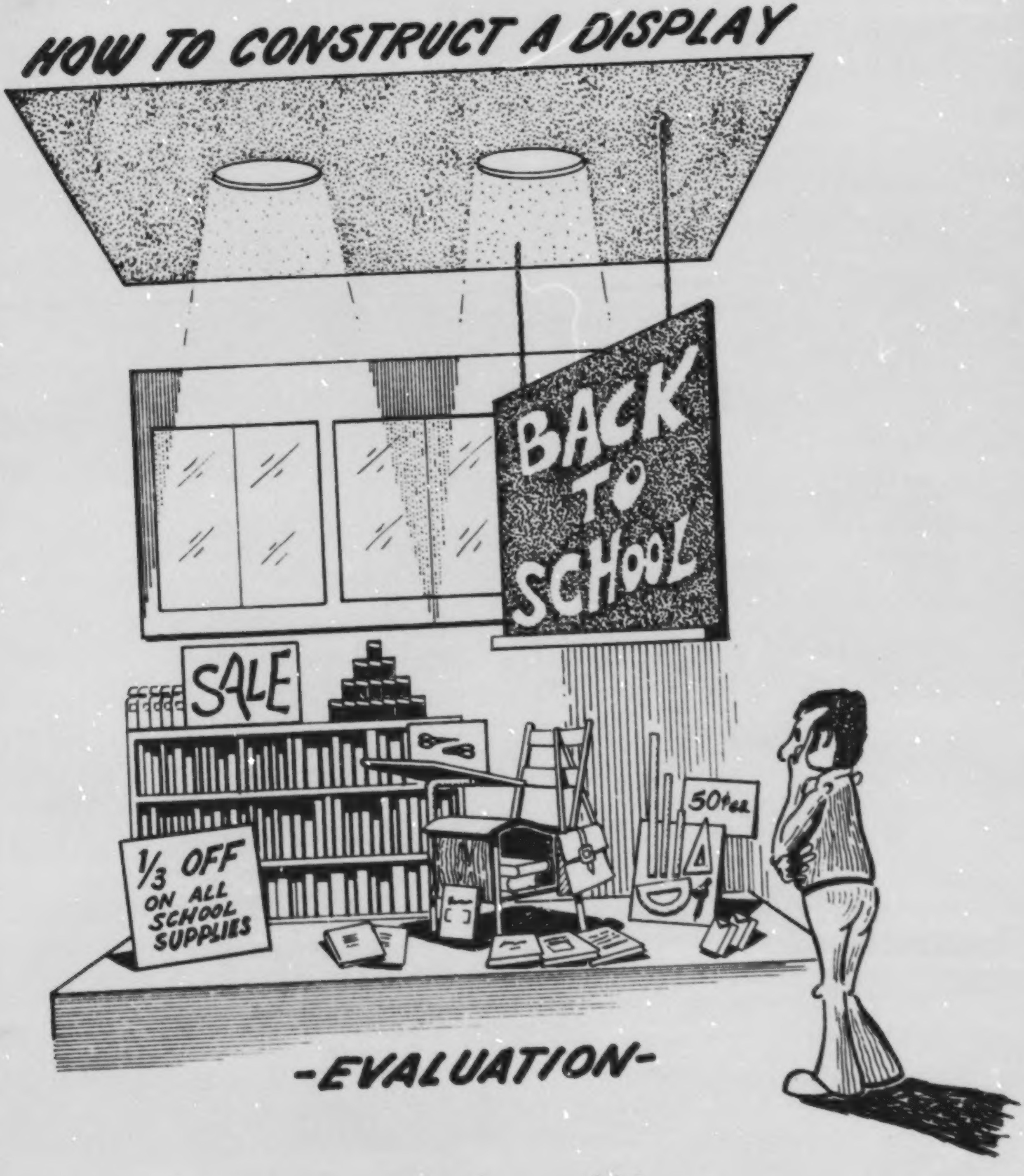
Transparency Master #11


HOW TO CONSTRUCT A DISPLAY
BACK TO SCHOOL
SALE
-MERCHANDISE-

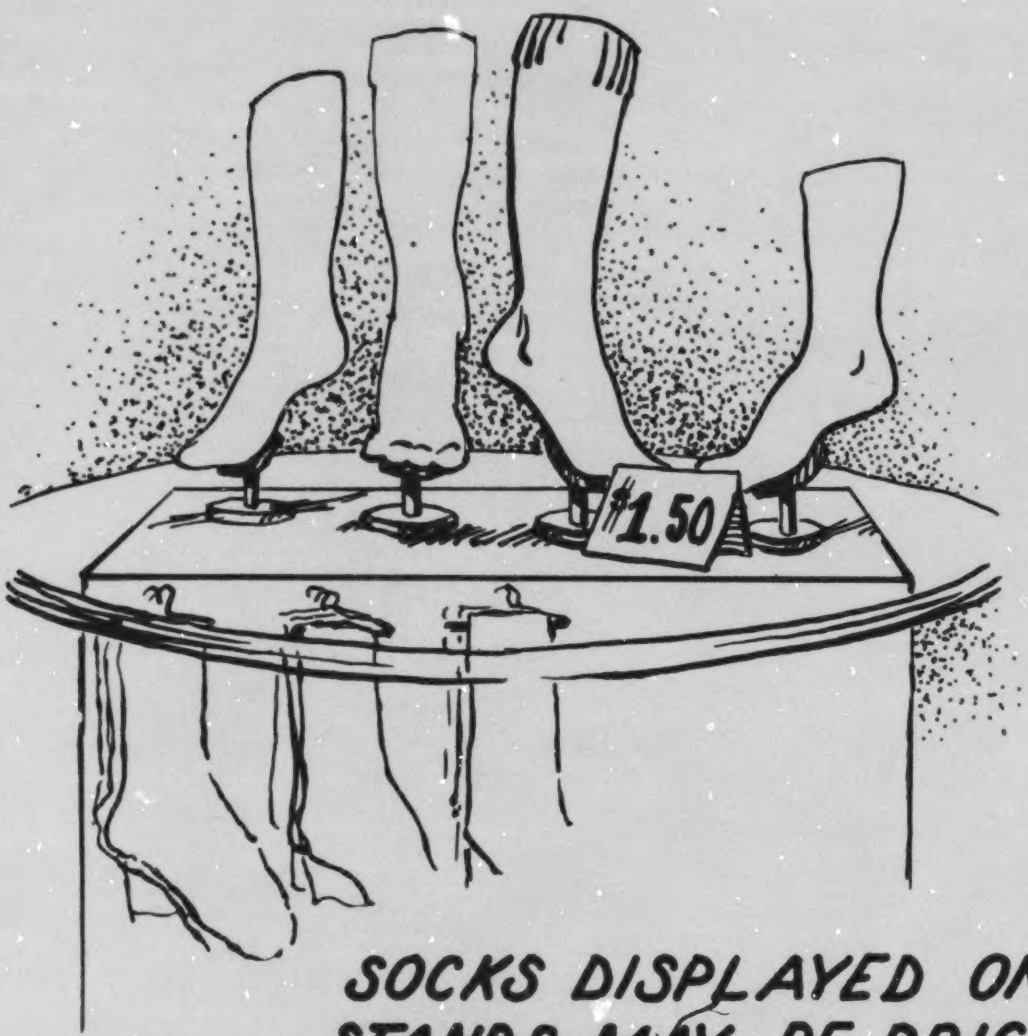
Transparency Master #12


HOW TO CONSTRUCT A DISPLAY
BACK TO SCHOOL
SA
1/3 OFF ON ALL SCHOOL SUPPLIES
50¢ea
"PLACING SIGNS IN THE DISPLAY"

Transparency Master #13

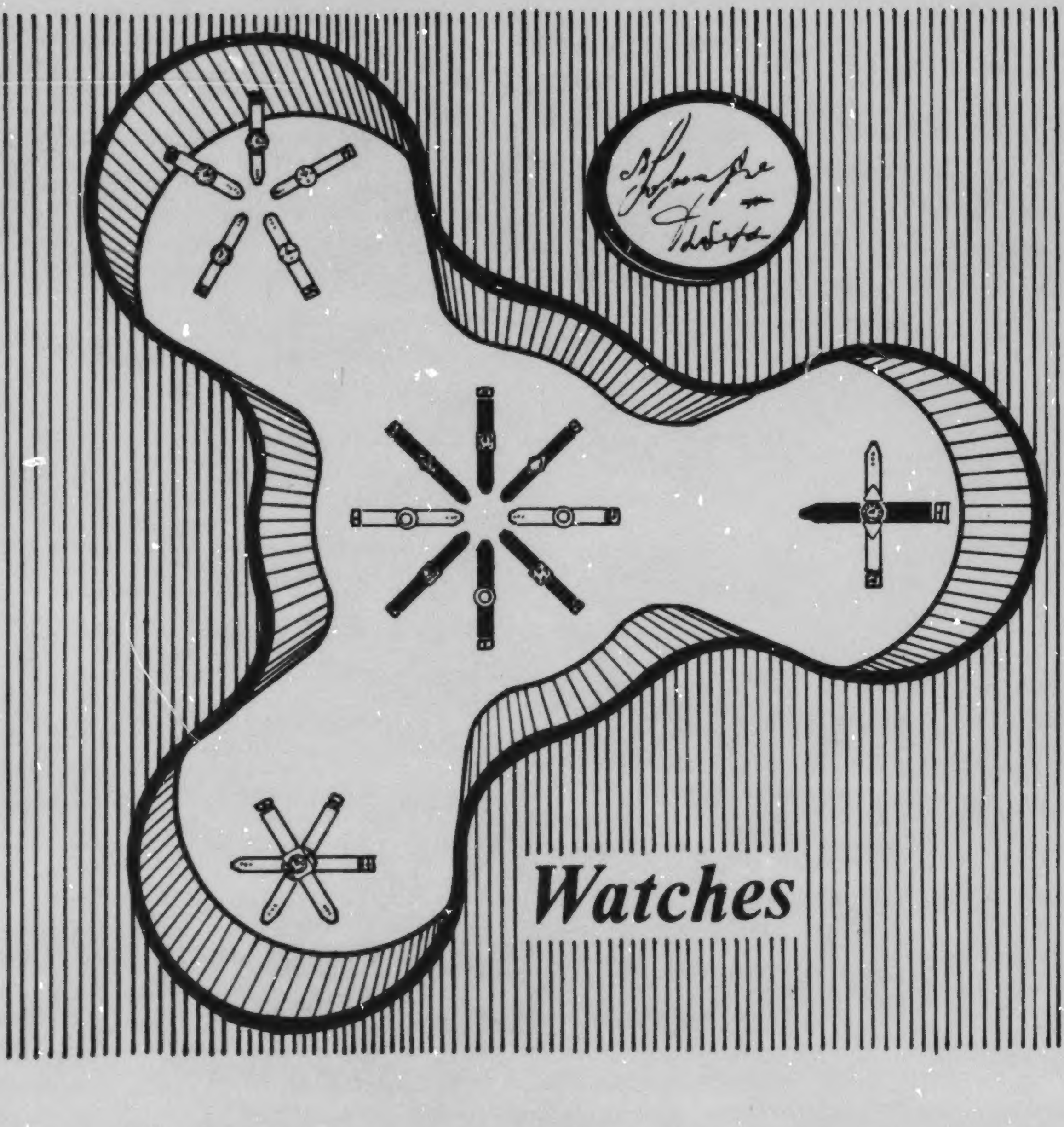

HOW TO CONSTRUCT A DISPLAY
BACK TO SCHOOL
SALE
50¢ea.
1/3 OFF ON ALL SCHOOL SUPPLIES
-EVALUATION-

Transparency Master #14

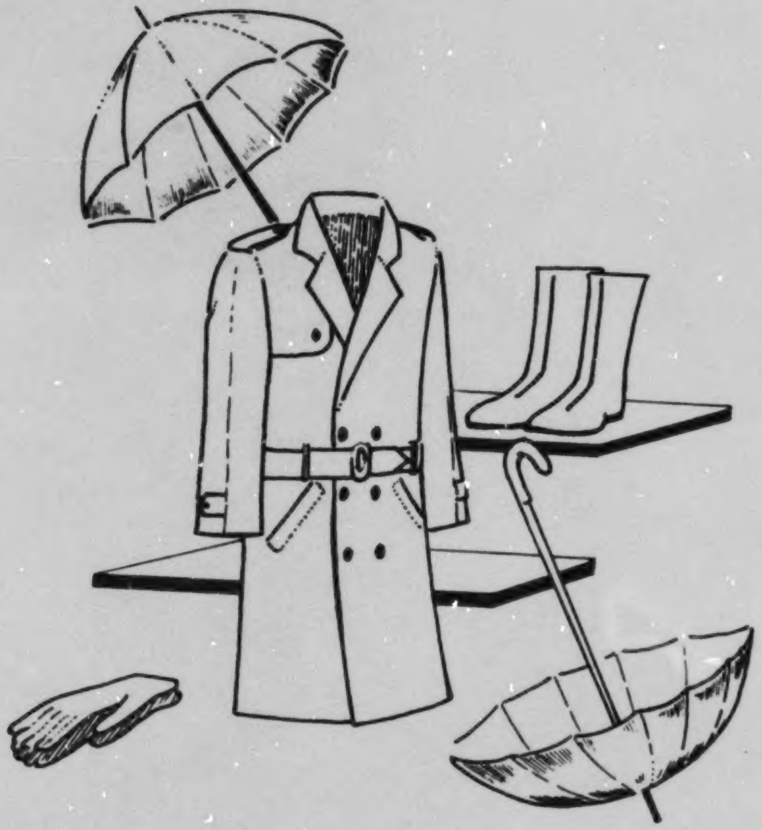


SOCKS DISPLAYED ON
STANDS MAY BE PRICED
WITH A SMALL CARD
PLACED NEAR THE
TOP OF THE STAND.

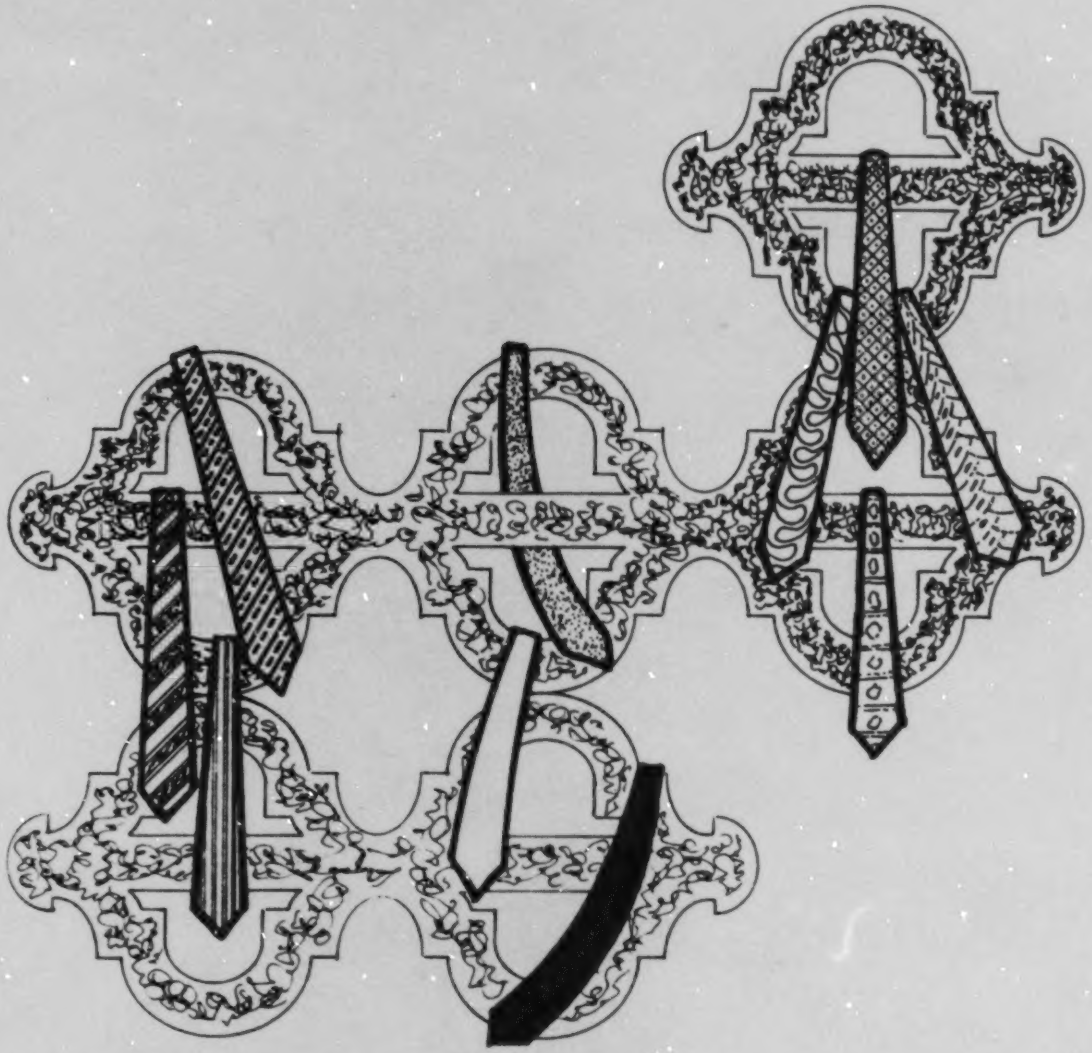
Transparency Master #15



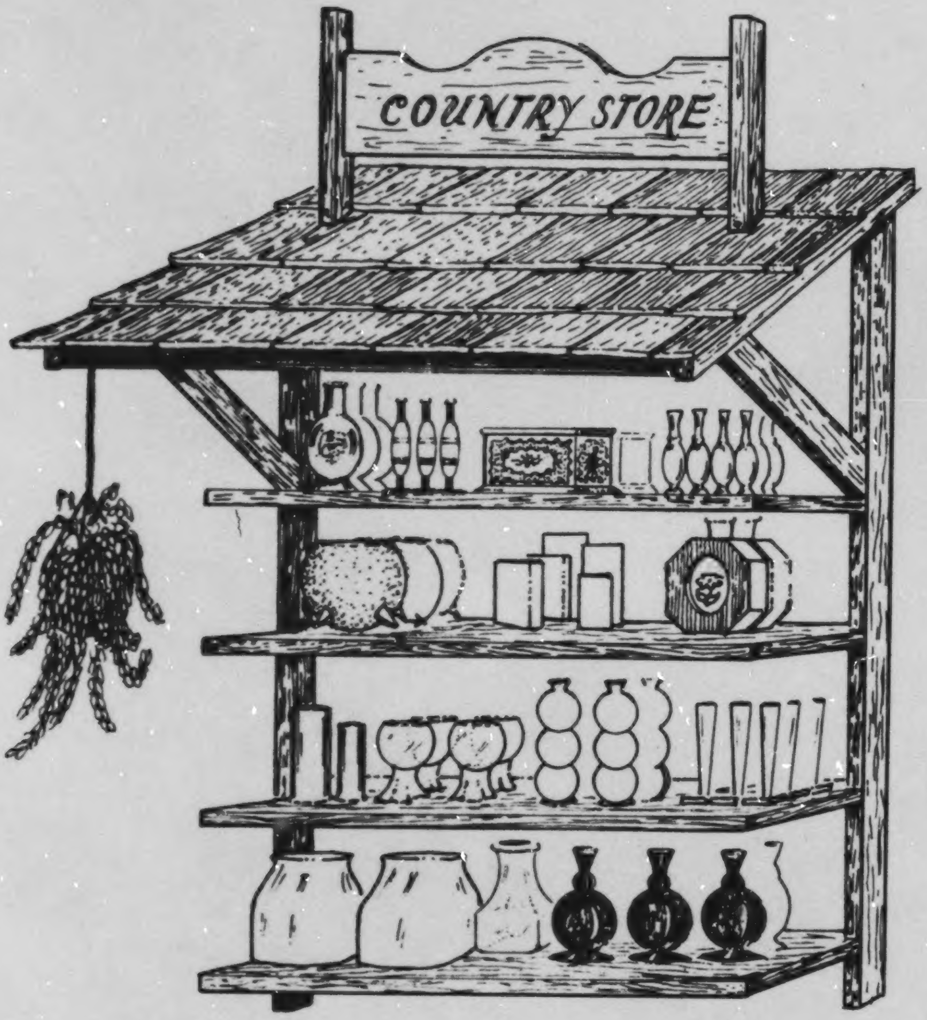
Transparency Master #16



Transparency Master #17



Transparency Master #18


COUNTRY STORE

Instructor's Final Checklist

SETTING UP COUNTER/TABLE-TOP DISPLAYS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The students' display was set up according to their approved plan:

	Accomplished	Not Accomplished
1. Theme	☐	☐
2. Merchandise	☐	☐
3. Arrangement pattern	☐	☐
4. Accessories	☐	☐
5. Props	☐	☐
6. Show cards	☐	☐

PROOFING AD LAYOUTS

OBJECTIVES

GIVEN five newspaper ads and a proofing checklist,

PROOF THE ADS BY COMPLETING A CHECKLIST FOR EACH ONE.

ALL ITEMS ON THE CHECKLIST should be accurately completed for at least four of the ads.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that ad layout can make the difference between high and low response.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. GOOD ADVERTISEMENTS	1
Instructor's Final Checklist	
PROOFING AD LAYOUTS	4

CHECK-OUT ACTIVITIES

Your instructor will provide five newspaper ads and a proofing checklist.

Fill out a proofing checklist for each ad.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have class read Instruction Sheet I. Discuss each of the elements of a good advertisement. Invite a resource person to talk to the class about ad layout.	Instruction Sheet I Suggested Resource Persons: Store manager Layout artist	
2	Have students clip newspaper ads and analyze each one based on the elements of a good advertisement. Let each student share with the class his/her favorite ad.	Newspapers Scissors	
3	Have the class plan and prepare a bulletin board display of good advertisements.	Ads Thumb tacks or pins Bulletin board	
4	Duplicate a copy of the Check-Out Activity Sheet for each student. Provide a newspaper ad for each student or have students bring their own. Have each student proof the ad by completing the proofing checklist. Use the Instructor's Final Checklist to evaluate each checklist.	Check-Out Activity Sheet Newspaper ads Instructor's Final Checklist	

Instructor's Final Checklist

PROOFING AD LAYOUTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student accurately completed all items on the proofing checklist for the ad:

	Accomplished	Not Accomplished
1. Purpose	☐	☐
2. Message	☐	☐
3. Headline	☐	☐
4. Copy	☐	☐
5. Store Identification	☐	☐
6. Spelling	☐	☐

Check-Out Activity

PROOFING AD LAYOUTS

Check "Yes" or "No" for each description below.

PROOFING CHECKLIST

Element of Ad	Description	Yes	No
Purpose	Immediate response Attitude		
Message	One idea		
Headine	Tells what ad is about Stands out from rest of copy		
Copy	Easy to read		
Store Identification	Gives name Gives address Gives telephone number		
Spelling	Correct		

PLANNING A GRAND OPENING

OBJECTIVE

GIVEN necessary supplies,

PLAN ONE PART OF YOUR STORE'S GRAND OPENING.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that creating good first impressions is vital to a new business, and that careful planning is essential for a grand opening.

CONTENTS OF MODULE

Instructor's Final Checklist	Learning Activity Number
PLANNING A GRAND OPENING	3

CHECK-OUT ACTIVITIES

Each Committee: Prepare a written plan for your part in your store's grand opening.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Divide the class into four committees: **The Theme Committee** selects the theme for the grand opening. Provide them a copy of the "Display Guide of Annual Events." **The Merchandise Committee**: --Identifies special merchandise to be featured. (Assure that merchandise identified is in stock.) --Assign price breaks to pieces of special merchandise. **The Promotional Attractions Committee** identifies promotional attractions that will encourage customers to attend the grand opening. Some ideas for promotions are: --A store sign --A sign pillar made with cardboard boxes --An ad to be run in student publications --Flyers for each classroom --Students wearing store logo --Promotion gimics: Guessing number of jelly beans in a jar; mystery person who, when identified, gives away coupons that can be exchanged for merchandise.	"Display Guide of Annual Events" (See Task Assignment Sheet PA-MD-19.)	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	The Short-Plug Committee identifies activities that will plug the store. Some ideas for plugs are: --Radio spot in daily school announcements for store --Slide or visual show that promotes store		
2	Have each committee present its selections to the class. Let the class, as a whole, decide which activities should be included in the grand opening.		
3	Have each committee prepare a written plan for the activities approved by the class. Use the Instructor's Final Checklist to evaluate each committee's performance.	Instructors' Final Checklist	
	(NOTE: Have the class prepare for the grand opening by carrying out the written plans.)		

Instructor's Final Checklist

PLANNING A GRAND OPENING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In planning a grand opening, the:

	Accomplished	Not Accomplished
1. Theme Committee:		
a. Selected several themes suitable for the store	☐	☐
b. Presented the themes to the class	☐	☐
c. Prepared a written copy of the theme selected by the class	☐	☐
2. Merchandise Committee:		
a. Identified merchandise in stock	☐	☐
b. Identified special merchandise to be featured	☐	☐
c. Assigned special price breaks to several pieces of special merchandise	☐	☐
d. Presented the selections to the class	☐	☐
e. Prepared a list of special merchandise to be featured and the merchandise, which was approved by the class, to receive price breaks	☐	☐
3. Promotional Attractions Committee:		
a. Identifed printed advertisement promotions	☐	☐
b. Identified promotional gimics	☐	☐
c. Presented selections to class	☐	☐
d. Prepared written plans for promotional attractions selected by the class	☐	☐
4. Short Plug Committee:		
a. Identified short-plug activities which are appropriate for the store	☐	☐
b. Presented the selections to the class	☐	☐
c. Prepared a written plan for the activities selected by the class	☐	☐

GETTING THE CASH DRAWER READY FOR BUSINESS

OBJECTIVES

GIVEN a cash drawer, change fund, and Change Fund Receipt form,

GET THE CASH DRAWER READY FOR BUSINESS.

ALL COINS AND BILLS must be accurately listed and totaled on the Change Fund Receipt form and placed in the right section of the cash drawer.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

Students will exercise responsibility in handling other people's money in order to keep it safe and to keep accurate records.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. COUNTING THE CASH DRAWER	1
II. PLACING MONEY IN THE CASH DRAWER	3
Student Self-Check	
I. COUNTING THE CASH DRAWER	2
Instructor's Final Checklist	
GETTING THE CASH DRAWER READY FOR BUSINESS	5

CHECK-OUT ACTIVITIES

Your instructor will provide a cash drawer, change fund, and Change Fund Receipt form.

Get the cash drawer ready for business.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read the first section of Instruction Sheet I. Discuss each section of the Change Fund Receipt form. As a class, do the practice exercise in the second section of the Instructor's Sheet.	Instruction Sheet I	
2	Duplicate a copy of the Change Fund Receipt form for each student. Set up work stations with the following amount of money: Coins Pennies: $1.50 Nickels: 2.00 Dimes: 5.00 Quarters: 15.00 Half dollars 1.50 Bills $ 1's - $15.00 5's - 15.00 10's - 20.00 OR Write the amounts on the chalk-board. Assign students to each station. Have each student fill out a Cash Fund Receipt form for the cash fund and check his/her answers with Student Self-Check I.	Change Fund Receipt form for each student (Master copy in this section.) Play money for change funds Student Self-Check I	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
3	Have students study the cash drawer in Instruction Sheet III. Discuss placement of the money in the cash drawer.	Instruction Sheet II	
4	(NOTE: you will need several cash drawers for this activity. They can be made by gluing small boxes together or by drawing a cash drawer on a large piece of paper or posterboard.) Set up work stations as in Learning Activity 2. Furnish each station with play money and a cash drawer. Assign students to each work station, and have them practice placing money in the cash drawer.	Cash drawers Play money for cash drawer	
5	Use the work stations as in Learning Activity 4. Provide each station with a cash drawer, play money, and cash Receipt Fund forms for each student. Arrange for each student to prepare a Cash Receipt Fund form and place the money in the cash drawer. Use the Instructor's Final Checklist to rate each student's work.	Cash drawers Play money for cash funds	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	(You may be able to arrange with school personnel for students to prepare cash drawers.)	Suggested School Personnel School bookkeeper Cafeteria cashier Sponsors of paid school events	

CHANGE FUND RECEIPT

Pennies .... $______
Nickels .... $______
Dimes ...... $______
Quarters ... $______
Halves ..... $______

COINS TOTAL $______

$1.00 ...... $______
$5.00 ...... $______
$10.00 ..... $______
$20.00 ..... $______

CURRENCY TOTAL $______

TOTAL CHANGE FUND $______

Date________ Register No.____

Received by___________________

Instructor's Final Checklist

GETTING THE CASH DRAWER READY FOR BUSINESS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In getting the cash drawer ready for business, the student:	Accomplished	Not Accomplished
1. Accurately listed all coins and bills on the Change Fund Receipt form	[ ]	[ ]
2. Placed the coins and bills in the right section of the cash drawer	[ ]	[ ]

PLANNING A SALES GREETING/OPENING

OBJECTIVE

GIVEN a Sales Greeting/Opening Worksheet listing five types of greeting/openers,

SELECT MERCHANDISE AND WRITE A SALES OPENER FOR EACH TYPE OF GREETING/OPENER.

EACH SALES OPENER should be appropriate for the merchandise, friendly, positive, and stated in a manner that should gain the customer's attention.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that a business depends on customers. In order to sell to those customers, they must be approached with a friendly, positive, helpful attitude by the salesperson.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. BASIC BELIEFS ABOUT SELLING	1
II. OPENING THE SALE	2
Instructor's Final Checklist	
PLANNING A SALES GREETING/OPENING	4

CHECK-OUT ACTIVITIES

Your instructor will provide a Sales Greeting/Opening Worksheet.

Select merchandise and write a sales opener for each type of sales greeting/opener.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I. Discuss why each of the beliefs should contribute to the success of a store.	Instruction Sheet I	
2	Have the class read Instruction Sheet II. Discuss each of the five types of greeting/openers. Conduct a rap session, and have students think of appropriate openings of each type. You may invite a resource person to talk to the class about salesmanship.	Instruction Sheet II	
3	Divide the class into five groups. Assign one of the five types of greeting/openers to each group. Have the groups choose merchandise that you have in your store and write several openers for the type of greeting/sales assigned. Let each group role play one of its sales openers. Have the rest of the class critique the opener, using the standard in the objective as criteria.		

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Provide each student a Check-Out Activity Sheet. Have students select merchandise that you have in your store and write a sales opener for each type of greeting/opener. Students may use the same merchandise for the five types of greeting/openers, or they may select different merchandise for each type. Use the Instructor's Final Checklist to evaluate each sales greeting/opener. (NOTE: This Check-Out Activity Sheet will be used for Task Assignment Sheet PA-MD-29, "Making a Sales Presentation.")	Check-Out Activity Sheet (Master copy is in this section.) Instructor's Final Checklist	

Instructor's Final Checklist

PLANNING A SALES GREETING/OPENING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In completing the Sales Greeting/Opening Worksheet, the student:

	Accomplished	Not Accomplished
1. Completed a sales opener for each of the five types of greeting/openings..................................	[ ]	[ ]
2. Each sales opener was:		
a. Appropriate for the merchandise.................	[ ]	[ ]
b. Friendly..	[ ]	[ ]
c. Positive..	[ ]	[ ]
d. Stated in a manner that should gain the customer's attention............................	[ ]	[ ]

Check-Out Activity

PLANNING A SALES GREETING/OPENING

Select a specific item of merchandise you handle in your store. Prepare a statement, question, description, etc. which you could say for each of the following sales openers. Complete your sales openers on the following Sales Greeting/Opener Worksheet.

SALES GREETING/OPENING WORKSHEET

Type of Greeting/Opener	Type of Merchandise	Question, Statement, Description, etc. to Use
Question		
Curiosity		
Special Interest		
Exhibit		
Merchandise		

DETERMINING CUSTOMER WANTS AND NEEDS

OBJECTIVES

GIVEN a Customer Wants and Needs Worksheet,

SELECT TEN PRODUCTS AND WRITE A QUESTION CONCERNING EACH PRODUCT.

EACH QUESTION should serve as an aid to help you determine a customer's wants and needs.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will understand that in order to have a "satisfied" customer, his/her wants and needs must be met.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. DETERMINING CUSTOMER WANTS AND NEEDS	1
Instructor's Final Checklist	
DETERMINING CUSTOMER WANTS AND NEEDS	4

CHECK-OUT ACTIVITIES

Your instructor will provide a Customer Wants and Needs Worksheet.

Select ten products you have in your school store. Write a question for each product that you could ask a customer to help you determine his/her needs.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I. Discuss the tips given for determining a customer's wants and needs.	Instruction Sheet I	
2	Conduct a class rap session. Name products you have in your school store, and have students compose questions that would aid in determining a customer's wants and needs.		
3	Divide the class into small groups. Have each group plan and present a short skit depicting determining a customer's wants and needs.		
4	Provide each student a Check-Out Activity Sheet. Have him/her select ten products you have in your school store, and write a question concerning each product. Use the Instructor's Final Checklist to evaluate each worksheet. (NOTE: This Check-Out Activity Sheet will be used in Task Assignment Sheet PA-MD-29, "Making a Sales Presentation.")	Check-Out Activity Sheet (Master copy in this section.) Instructor's Final Checklist	

Instructor's Final Checklist

DETERMINING CUSTOMER WANTS AND NEEDS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In completing the Customer Wants and Needs Worksheet, the student:

	Accomplished	Not Accomplished
1. Wrote a question concerning each of the ten products	[ ]	[ ]
2. Composed questions that could be used to determine a customer's wants and needs	[ ]	[ ]

Check-Out Activity

DETERMINING CUSTOMER WANTS AND NEEDS

Select ten products handled in your store. For each product, write a question that you could ask a customer, to help you determine his/her wants and needs.

CUSTOMER WANTS AND NEEDS WORKSHEET

Product	Question to Ask
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

GETTING INFORMATION ABOUT MERCHANDISE

OBJECTIVE

GIVEN a product,

IDENTIFY SIX FEATURES AND SIX BENEFITS OF THE PRODUCT.

EACH FEATURE should tell what the product has or is; EACH BENEFIT should tell what the product can do for the customer.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that in order for a salesperson to best serve a customer, he/she must "know the product" he/she is trying to sell.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. WHAT DO CUSTOMERS WANT FROM A PRODUCT?	2

Instructor's Final Checklist	
GETTING INFORMATION ABOUT MERCHANDISE	4

CHECK-OUT ACTIVITIES

List six features and six benefits of the product you selected in Learning Activity 1. You may refer to the groupings you did for Learning Activity 3.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have each student select a product that you have in stock for your school store and find as much information as possible on the product. Some sources of information are: (1) The product itself (2) Information attached to or stamped on the product (3) Use-and-care manual (4) Advertisements (5) Persons who use the same kind of product	School store products Use-and-care manuals	
2	Have students refer to Instruction Sheet I to help identify benefits of the products selected. Conduct a brain storm session. Name products and have students name their benefits; e.g., "toaster"-warm, brown toast.	Instruction Sheet I	
3	Have students group their product information by "features" and "benefits". The objective standard defines each classification.		
4	Have students list six features and six benefits of the products they selected. Allow them to refer to the groupings they did in Learning Activity 3.	Students' groupings of product information for Learning Activity 3.	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Use the Instructor's Final Checklist to evaluate each student's work. (NOTE: This Check-Out Activity will be used for the following task assignment sheet.)	Instructor's Final Checklist	

Instructor's Final Checklist

GETTING INFORMATION ABOUT MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In identifying features and benefits of a product, the student:

	Accomplished	Not Accomplished
1. Selected a product....................................	☐	☐
2. Listed six features of the product (what the product has or is)...	☐	☐
3. Listed six benefits of the product (what the product can do for the customer)............................	☐	☐

PLANNING TO DESCRIBE AND DEMONSTRATE MERCHANDISE

OBJECTIVES

GIVEN a Describing and Demonstrating Merchandise Worksheet,

MAKE A PLAN TO DESCRIBE AND DEMONSTRATE ONE PRODUCT SELLING POINT.

ALL SECTIONS of the Worksheet should be completed.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Student will realize that one of the best ways to demonstrate merchandise is to get the customer involved.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. THE ART OF DEMONSTRATING	3
Instructor's Final Checklist	
PLANNING TO DESCRIBE AND DEMONSTRATE MERCHANDISE	5

CHECK-OUT ACTIVITIES

Your instructor will provide a Describing and Demonstrating Merchandise Worksheet.

Complete the Worksheet for the product selling point you selected in Learning Activity 1. Use the notes you prepared for Learning Activities 2 and 4 as a guide.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Assure that each student has his/her Check-Out Activity Sheet for Task Assignment Sheet PA-MD-25. Have students select one benefit--not feature--to describe and demonstrate. Benefits are "selling points."	Check-Out Activity Sheets for Task Assignment Sheet PA-MD-25, "Getting Information about Merchandise"	
2	Have each student write a short story describing the selling point. He/she can make rough notes. They are not to be turned in.		
3	Have students read Instruction Sheet I. Discuss ways customers can be involved in demonstrations. Conduct a brainstorm session. Name products and have students think of ways to involve customers through their five senses.	Instruction Sheet I	
4	Have students make demonstration plans, including supplies needed, procedure, and ways to involve customers.		
5	Provide each student a copy of the Check-Out Activity Sheet. Have him/her to complete the planning sheet for the selling point selected in Learning Activity 1. Students may use their notes as reference.	Check-Out Activity Sheet (Master copy in this section.) Instructor's Final Checklist	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Use the Instructor's Final Checklist to evaluate each planning sheet. (NOTE: This Check-Out Activity Sheet will be used for Task Assignment Sheet PA-MD-29.)		

Instructor's Final Checklist

PLANNING TO DESCRIBE AND DEMONSTRATE MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student completed all sections of the Describing and Demonstrating Merchandise Worksheet:

	Accomplished	Not Accomplished
1. Product	[ ]	[ ]
2. Selling Point	[ ]	[ ]
3. Story Explaining Selling Point	[ ]	[ ]
4. Demonstration		
a. Supplies Needed	[ ]	[ ]
b. Procedure	[ ]	[ ]
c. Customer Involvement	[ ]	[ ]

Check-Out Activity

PLANNING TO DESCRIBE AND DEMONSTRATE MERCHANDISE

Complete the planning sheet below.

DESCRIBING AND DEMONSTRATING MERCHANDISE WORKSHEET

PRODUCT:	
SELLING POINT:	
STORY EXPLAINING SELLING POINT:	
DEMONSTRATING THE SELLING POINT **Supplies Needed:**	
Procedure:	
Customer Involvement:	

HANDLING CUSTOMER OBJECTIONS

OBJECTIVE

GIVEN eight customer objections,

WRITE POSSIBLE ANSWERS FOR EACH OBJECTION.

AT LEAST TWO ANSWERS should be written for each objection.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that a customer's objections should be respectfully accepted by the salesperson.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. OBJECTION ANALYSIS CHART	2
II. ANSWERING OBJECTIONS	4

Instructor's Final Checklist	
HANDLING CUSTOMER OBJECTIONS	7

CHECK-OUT ACTIVITIES

Your instructor will provide an Objections Worksheet.

Write at least two possible answers for each objection listed.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students interview parents or a family friend who have had objections regarding buying merchandise. Have them list the objections and the answers to the objections. Students who have tape recorders may tape the interview. Let the class share the interviews.		
2	As a class, read and discuss each type of objection and acceptable answers.	Instruction Sheet I	
3	Name several kinds of products, and have students write possible objections regarding the product. Let the class share their work.		
4	Have the class read Instruction Sheet II. Discuss each rule for answering an objection.	Instruction Sheet II	
5	Using the objections written in Learning Activity 3, have students write an answer to each objection.		

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Let pairs of students role play a salesperson dealing with a customer objection. (The objections/answers in Learning Activity 5 may be used for dialogue.) Have students follow the rules in Instruction Sheet II.	Instruction Sheet II	
7	Provide each student a Check-Out Activity Sheet, and have him/her write two possible answers for each objection. Use the Instructor's Final Checklist to evaluate each student's work.	Check-Out Activity Sheet Instructor's Final Checklist	

Instructor's Final Checklist

HANDLING CUSTOMER OBJECTIONS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
In completing the Objections Worksheet, the student wrote two possible answers for each of the eight objections...	☐	☐

Check-Out Activity

HANDLING CUSTOMER OBJECTIONS

Write answers to each situation below.

OBJECTIONS WORKSHEET

Name of Product:

Objection	Possible Answers
1. The price is too high.	
2. I can buy this item cheaper at ______.	
3. This is too complicated to operate.	
4. I can't believe I will get enough use out of it.	
5. I think I can get along without it for a while longer.	
6. This item wasn't quite what I had in mind.	

Check-Out Activity (p. 2)

Name of Product:

Objection	Possible Answers
7. I've never heard of this brand name before.	
8. Why should I buy at the school store when I can shop downtown?	

PLANNING A SALES CLOSING

OBJECTIVES

GIVEN a Sales Closing Worksheet listing closing methods,

WRITE A SALES CLOSING FOR EACH METHOD.

EACH SALES CLOSING should fulfill the requirements of the method indicated.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that closing a sale is what selling is all about. The closing must be carefully planned to meet the wants and needs of the customer.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. CLOSING A SALE	2
Instructor's Final Checklist	
PLANNING A SALES CLOSING	5

CHECK-OUT ACTIVITIES

Your instructor will provide a Sales Closing Worksheet.

Write a sales closing for each method listed.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Let students draw on their past experience to list ways they or their parents have been urged to buy merchandise. Have them check the ways they like best. Allow time for the class to share their lists.		
2	Have students read Instruction Sheet I. Discuss each method of closing a sale.	Instruction Sheet I	
3	Demonstrate for the class each of the methods described in Instruction Sheet I.	A product(s) suitable for each method of closing a sale	
4	Divide the class into five groups. Assign each group one of the sales closing methods. Have the group members role play the sales closing for the class.		
5	Provide each student a Check-Out Activity Sheet. Have him/her write a sales closing for each method listed. (NOTE: This Check-Out activity Sheet will be used for Task Assignment Sheet PA-MD-29.)	Check-Out Activity Sheet (Master Copy in this section.) Instructor's Final Checklist	

Instructor's Final Checklist

PLANNING A SALES CLOSING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In completing the Sales Closing Worksheet, the student wrote a sales closing which fulfilled the requirements of the method indicated:

	Accomplished	Not Accomplished
1. Review Selling Points	☐	☐
2. Assume a Closing	☐	☐
3. Offer Something Extra	☐	☐
4. Last Chance to Buy	☐	☐
5. Ask Directly	☐	☐

Check-Out Activity

PLANNING A SALES CLOSING

SALES CLOSING WORKSHEET

Method	Closing
Review Selling Points	
Assume a Closing	
Offer Something Extra	
Last Chance to Buy	
Ask Directly	

MAKING A SALES PRESENTATION

OBJECTIVE

GIVEN a product and a customer,

MAKE A SALES PRESENTATION.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that super-salespeople always have well-planned sales presentations.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. MAKING A SALES PRESENTATION	3
Instructor's Final Checklist	
MAKING A SALES PRESENTATION	6

CHECK-OUT ACTIVITIES

Make a sales presentation for the product you chose in Learning Activity 1. Your instructor or a classmate may role play the part of the customer.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have each student identify a product to use for a sales presentation. The products may be ones in stock in your school store or may be brought from the student's home.	A product for each student	
2	Assure that each student has his/her Check-Out Activity Sheets completed for the Task Assignment Sheets listed at the right.	Check-Out Activity Sheets completed for Task Assignment Sheets PA-MD-23, 24, 25, 26, 27, and 28.	
3	Have students read Instruction Sheet I. Discuss how each item listed can enhance a sales presentation.	Instruction Sheet I	
4	Demonstrate for the class how to make an effective sales presentation. (NOTE: Before the demonstration, provide the student customer an objection concerning the product. Have him/her interject it during your sales presentation.)	A product A student customer An objection concerning the product	
5	Request your students to practice their sales presentations at home.		
6	Several days may be required for every student to go through this Check-Out Activity.	Products chosen in Learning Activity 1 A customer for each sales presentation	

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IA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	For each product used: (1) prepare a customer request for the product; (2) prepare an objection. Assure that a customer is available for each presentation. You may choose students, or you may prefer to do it yourself. For each customer, provide the appropriate request for the product and the objective. Coach each customer when to interject these. An alternative to the above would be to have customers compose and interject their own requests and objections. (The purposes of these two activities are to have the salesperson to determine the customer's needs and wants and to deal with customer objections.) Have each student make a sales presentation. Use the Instructor's Final Checklist to rate each performance.	For each product; a customer request for the product; an objection Instructor's Final Checklist	

Instructor's Final Checklist

MAKING A SALES PRESENTATION

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In making a sales presentation, the student:

	Accomplished	Not Accomplished
1. Promptly approached the customer with a friendly greeting	☐	☐
2. Showed an interest in the customer	☐	☐
3. Carefully listened and watched the customer to determine his/her needs and wants	☐	☐
4. Asked a question(s) to clarify exactly what the customer needed and wanted	☐	☐
5. Opened the sale by making a brief, interesting statement about the product	☐	☐
6. Described the selling points of the product	☐	☐
7. Demonstrated the product with ease	☐	☐
8. Included the customer in the demonstration	☐	☐
9. Answered any objections respectfully and honestly	☐	☐
10. Showed enthusiasm	☐	☐
11. Used an appropriate sales closing method	☐	☐

FILLING OUT A SALES TICKET

OBJECTIVE

GIVEN a description of a sale and a sales ticket,

FILL OUT THE SALES TICKET.

THE SALES TICKET should be neat, easy to read, and include accurate information in the correct spaces.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will take pride in filling out neat, legible, and accurate records.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. FILLING OUT A SALES TICKET	2
Instructor's Final Checklist	
FILLING OUT A SALES TICKET	5

CHECK-OUT ACTIVITIES

Your instructor will provide a description of a sale and a sales ticket.

Fill out the sales ticket.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students bring sales tickets they have received when making purchases. Have the class compare the different kinds of tickets.	Sales tickets that have been completed	
2	Have the class study Instruction Sheet I. Discuss the parts of the sales ticket. Explain special points: (1) Some stores do not include the customer's name and address for cash sales. (See * at bottom of Instruction Sheet.) (2) Big stores are organized by departments, and each one is assigned a number. (3) The "Unit Price" is the cost of one "Item." The "amount" is figured by multiplying the "Quantity" by the "Unit Price." (4) Review how to figure percentages for the sales tax.	Instruction Sheet I	
3	Make a transparency of the sales ticket. Demonstrate for the class how to fill out a sales ticket.	Transparency of a sales ticket (Master copy is in this section.) Transparency film Overhead projector Marking pen	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Duplicate copies of the sales ticket for each student. Provide several sales descriptions, and have the students fill out a sales ticket for each description. Let students check their work in class.	Descriptions of sales Sales Tickets	
6	Provide each student a copy of the Check-Out Activity Sheet. Have him/her fill out the sales ticket for the sale. Use the Answer Key to check each sales ticket. Use the Instructors's Final Checklist to evaluate each students work.	Check-Out Activity Sheet Answer Key Instructor's Final Checklist	

Master Copy

Task Assignment Sheet PA-MD-30

XC **X-Company**
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE ______________________

NAME ____

ADDRESS ____
STREET

____
CITY STATE ZIP CODE

SOLD BY CASH ☐ REC. ON ACCT. ☐
CHARGE ☐ PAID OUT ☐

Amount Received from customer ____________

Dept.	Quantity	Item	Unit Price	Amount	

ITEM TOTAL		
SALES TAX		
TOTAL		

Received by ____

All returns or adjustments must be accompanied by this receipt.

Instructor's Final Checklist

FILLING OUT A SALES TICKET

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's sales ticket was:

	Accomplished	Not Accomplished
1. Neat	[ ]	[ ]
2. Easy to read	[ ]	[ ]
3. Included accurate information in the correct spaces	[ ]	[ ]

Check-Out Activity

FILLING OUT A SALES TICKET

Fill out the sales ticket for the sale below.

SALE

Sold To: Bobby Thompson, 118 Forest Avenue, Anytown, Kentucky 00000

Department: 1

Sold By: Cash

Amount of Cash Received: $30.00

Merchandise Sold:	1 shirt	$10.00 each
	2 ties	6.00 each
	1 socks	3.50 pair

Sales Tax: 5%

X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE ______________

NAME ______________

ADDRESS ______________
STREET

____
CITY STATE ZIP CODE

SOLD BY CASH ☐ CHARGE ☐ REC. ON ACCT. ☐ PAID OUT ☐ Amount Received from customer ______

Dept.	Quantity	Item	Unit Price	Amount
			ITEM TOTAL	
			SALES TAX	
			TOTAL	

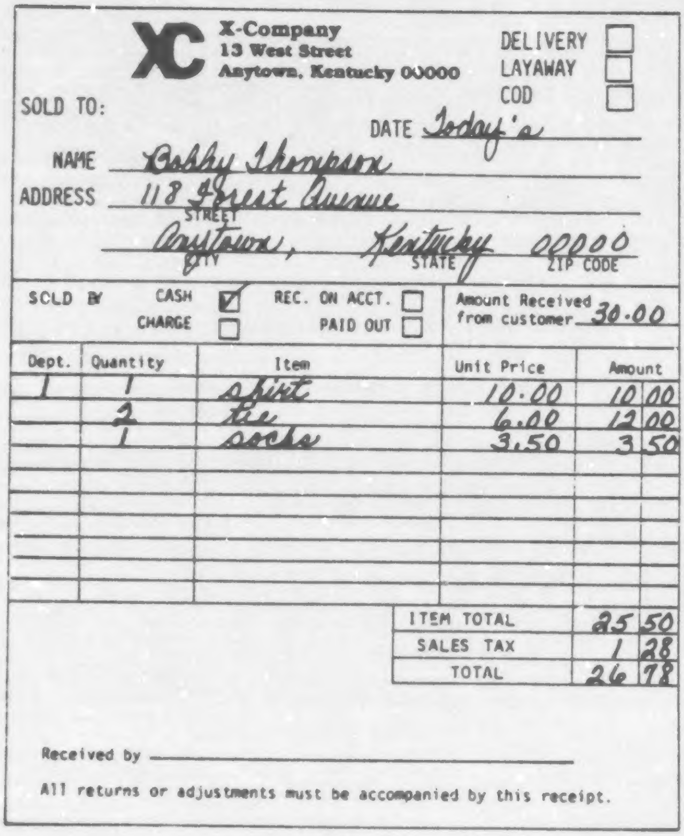
Received by ______________

All returns or adjustments must be accompanied by this receipt.

ANSWER KEY

Check-Out Activity

FILLING OUT A SALES TICKET



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE Today's

NAME Bobby Thompson

ADDRESS 118 Forest Avenue
STREET

Anytown, Kentucky 00000
CITY STATE ZIP CODE

SOLD BY CASH ☑ CHARGE ☐ REC. ON ACCT. ☐ PAID OUT ☐

Amount Received from customer 30.00

Dept.	Quantity	Item	Unit Price	Amount	
1	1	shirt	10.00	10	00
	2	tie	6.00	12	00
	1	socks	3.50	3	50

ITEM TOTAL	25	50
SALES TAX	1	28
TOTAL	26	78

Received by ____________________

All returns or adjustments must be accompanied by this receipt.

EXAMINING CHECKS

OBJECTIVE

GIVEN three checks,

IDENTIFY THE CHECK THAT IS ACCEPTABLE.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will become aware that business owners lose thousands of dollars every year because of "bad" checks.

--Students will understand that checks must be examined very carefully for validity.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. EXAMINING THE FRONT OF A CHECK	1
II. EXAMINING THE BACK OF A CHECK	3
III. EXAMINING IDENTIFICATION	5
Student Self-Check	
I. EXAMINING ENDORSEMENTS	4
Instructor's Final Checklist	
EXAMINING CHECKS	7

CHECK-OUT ACTIVITIES

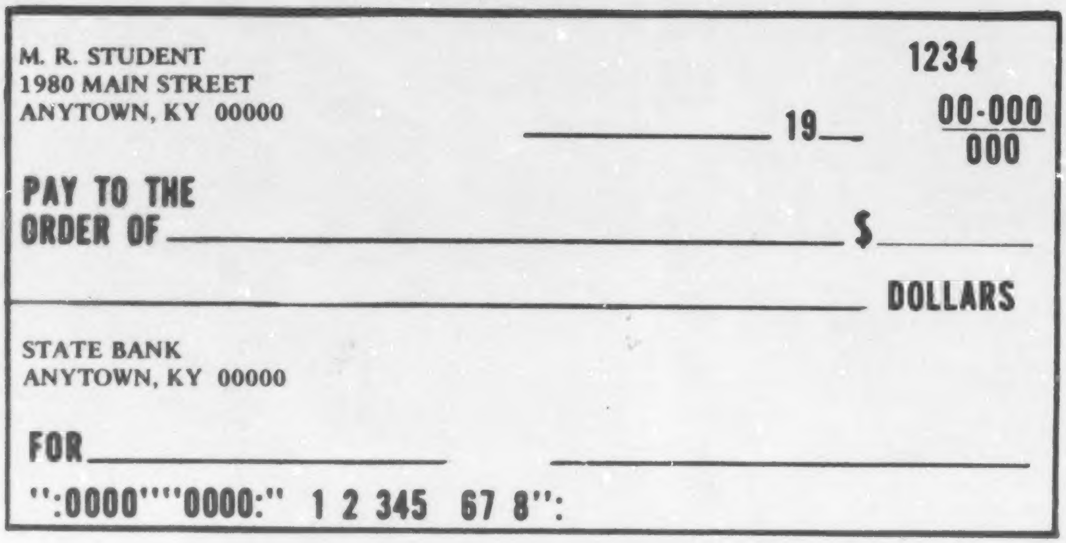
Your instructor will provide three checks.

Write the number of the check that is acceptable.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I. Discuss the features of a check that a salesperson or cashier-checker must examine before accepting it from a customer.	Instruction Sheet I	
2	Make a transparency of the blank check. Fill out the check several times, and have students examine each one. Make some checks valid and others invalid.	Transparency master of a blank check (Master copy is in this section.) Transparency film Overhead projector Grease pencil or water soluble felt tip pens Tissue or cloth for erasing	
3	As a class, read Instruction Sheet II. Discuss each of the endorsements.	Instruction Sheet II	
4	Have students complete Student Self-Check I. After students have completed the exercise, discuss each endorsement.	Student Self-Check I	
5	Have the class read Instruction Sheet III. Discuss the features that make a good identification.	Instruction Sheet III	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
6	Show the class different items of identification. Have students identify the items that best serve as a means of identification.	Items of identification, such as: Social Security card Credit cards Check cashing cards Drivers license Hunting and fishing license Envelope with your address Health cards	
7	Provide each student a Check-Out Activity Sheet, and have him/her write the number of the acceptable check. Use the answer key to check each student's answer. Use the Instructor's Final Checklist to evaluate each student.	Check-Out Activity Sheet Answer Key Instructor's Final Checklist	

BLANK CHECK



M. R. STUDENT
1980 MAIN STREET
ANYTOWN, KY 00000

1234

________________ 19__

00-000
000

PAY TO THE
ORDER OF ________________________________ **$** ________

________________________________ **DOLLARS**

STATE BANK
ANYTOWN, KY 00000

FOR ________________ ________________________

":0000""0000:" 1 2 345 67 8":

Instructor's Final Checklist

EXAMINING CHECKS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

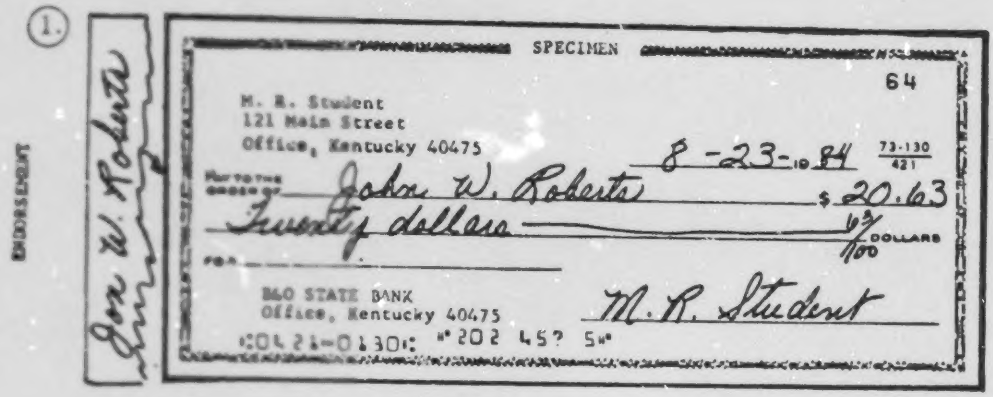
In examining checks, the student:	Accomplished	Not Accomplished
1. Identified the one acceptable check..................	☐	☐
2. Wrote the number of the acceptable check.............	☐	☐

Check-Out Activity

EXAMINING CHECKS

Write the number of the acceptable check below. USE YOUR OWN PAPER. Do not write on this page.

①



ENDORSEMENT

Jon W. Roberts

SPECIMEN

64

M. R. Student
121 Main Street
Office, Kentucky 40475

8-23-19 84 73-130/421

PAY TO THE ORDER OF John W. Roberts $ 20.63

Twenty dollars 63/100 DOLLARS

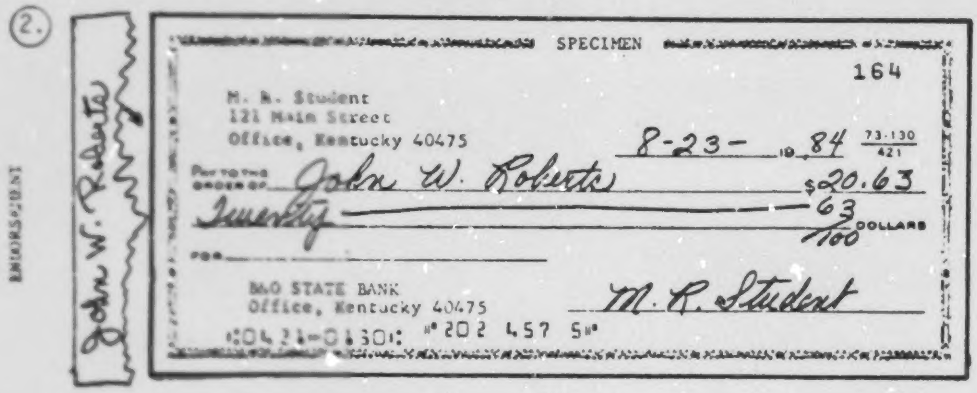
FOR

B&O STATE BANK
Office, Kentucky 40475

M. R. Student

⑆0421-0130⑆ ⑈202 457 5⑈

②



ENDORSEMENT

John W. Roberts

SPECIMEN

164

M. R. Student
121 Main Street
Office, Kentucky 40475

8-23-19 84 73-130/421

PAY TO THE ORDER OF John W. Roberts $ 20.63

Twenty 63/100 DOLLARS

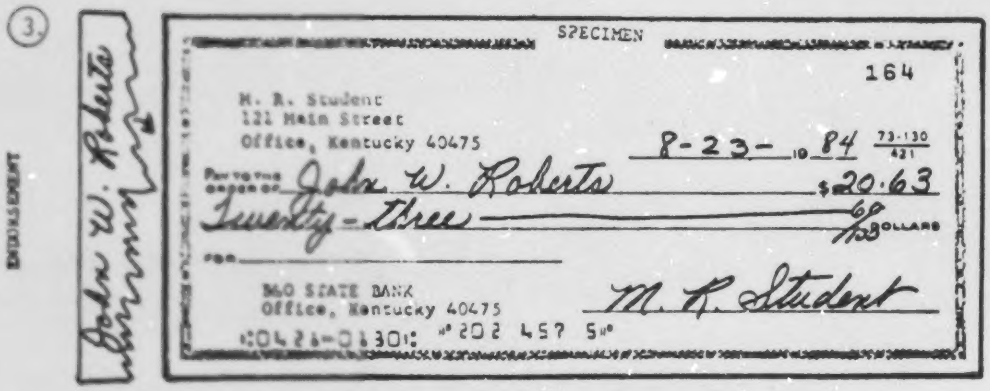
FOR

B&O STATE BANK
Office, Kentucky 40475

M. R. Student

⑆0421-0130⑆ ⑈202 457 5⑈

③



ENDORSEMENT

John W. Roberts

SPECIMEN

164

M. R. Student
121 Main Street
Office, Kentucky 40475

8-23-19 84 73-130/421

PAY TO THE ORDER OF John W. Roberts $ 20.63

Twenty-three 63/100 DOLLARS

FOR

B&O STATE BANK
Office, Kentucky 40475

M. R. Student

⑆0421-0130⑆ ⑈202 457 5⑈

BEST COPY AVAILABLE

ANSWER KEY

Check-Out Activity

EXAMINING CHECKS

Check 1: Unacceptable. The endorsement does not agree with the "John W. Roberts" on the front of the check.

Check 2: Acceptable.

Check 3: Unacceptable. The figure and written amounts do not agree.

MAKING CHANGE

OBJECTIVES

GIVEN a cash drawer, money, merchandise, and a customer,

MAKE CHANGE AND COUNT IT OUT TO THE CUSTOMER.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that following the correct procedure for making change can benefit the store by: avoiding customer questions and concerns; building good will for the store; dealing with "quick-change artists"; and at times, saving the store money.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. MAKING CHANGE	1
II. SUBTRACTING CENTS WHEN MAKING CHANGE	4
Instructor's Final Checklist	
MAKING CHANGE	7

CHECK-OUT ACTIVITIES

Your instructor will provide a cash drawer, money, merchandise and a customer.

Make change and count it out to the customer.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I. Discuss each procedure for making change. Make the students aware of the importance of following the correct procedures in addition to figuring the correct amount of change.	Instruction Sheet I	
2	Demonstrate making change for the class.	Cash drawer Money (real or play) (You may use the supplies used for Task Assignment Sheet PA-MD-22, "Getting the Cash Drawer Ready for Business.")	
3	Choose problems 1-5 from the chart. Have students indicate the coins and currency due back to the customer.	Problems dealing with making change (See Making Change Chart in this section.)	
4	Have the class read Instruction Sheet II. Discuss the information very carefully, because the situation discussed here can be very confusing. Show several examples on the board of how to figure and count change when customers include the odd cents with their payments.	Instruction Sheet II	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Choose problems 6-10 from the chart. Have the students indicate the coins and currency due back to the customer.	Problems dealing with subtracting cents when making change (See Making Change Chart in this section.)	
6	Set up several work stations in the classroom. Assign students to each work station. Have them take turns making change while the rest of the group critiques the performance.	Cash drawer Money (play)	
7	Arrange to have each student make change. Here are a few suggestions: (1) Arrange for a few students to work at the ticket office for paying school functions such as ball games or plays. (2) Arrange for one or two students a day to work with the cafeteria cashier. (3) Allow students to demonstrate making change for a parent at home. (4) Have students make change while working in the school store. (5) Use the work stations set up for Learning Activity 6. Have each	Cash drawer Money (real or play) Merchandise A customer for each student Instructor's Final Checklist	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	student demonstrate for the group how to make change. Assign a recorder for each group to observe each performance. Have persons in charge of the situations mentioned above, use the Instructor's Final Checklist to evaluate each student's performance.		

MAKING CHANGE CHART

Amount of Sale	Money Received	Change Returned								
		1¢	5¢	10¢	25¢	50¢	$1	$5	$10	$20
$ 3.46	$10.00	4				1	1	1		
10.18	25.00									
1.07	1.50									
22.63	30.00									
.46	5.00									
5.72	20.02									
10.13	50.03									
3.24	5.04									
.17	20.02									
36.62	40.02									

Instructor's Final Checklist

MAKING CHANGE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In making change, the student:

		Accomplished	Not Accomplished
1.	Announced the total amount of the purchase................	[ ]	[ ]
2.	Repeated the total and announced the amount received......	[ ]	[ ]
3.	Placed the money received face up on the cash drawer......	[ ]	[ ]
4.	Removed the change due from the cash drawer, counting from the amount of the purchase to the amount received from the customer, OR When customer included extra cents, first subtracted extra cents from both the amount received and the amount of the purchase, and then counted from the amount of purchase to amount received....................	[ ]	[ ]
5.	Counted back the correct amount of change to customer.....	[ ]	[ ]
6.	Put the money received face up in the proper compartments of the cash drawer................................	[ ]	[ ]
7.	Closed the drawer..	[ ]	[ ]

GIFT WRAPPING

OBJECTIVE

GIVEN a square or rectangular box, gift wrapping supplies, and an item of merchandise,

GIFT WRAP THE MERCHANDISE.

YOUR PACKAGE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand the value of businesses offering extra services to customers.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. PREPARING THE BOX FOR GIFT WRAPPING	1
II. WRAPPING THE PACKAGE	2
III. PUTTING RIBBON ON THE PACKAGE	3
IV. MAKING BOWS	4

Instructor's Final Checklist	
GIFT WRAPPING	5

CHECK-OUT ACTIVITIES

Bring gift wrapping supplies to class.

Gift wrap an item of merchandise.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	You may have students bring the supplies listed at the right to class. You may arrange to have a gift wrapper to demonstrate gift wrapping techniques for the class.	Suggested Gift Wrapping Supplies: (Manila wrapping paper or grocery bags for practice sessions) String (for practice sessions) Square or rectangular boxes Tissue paper Gift wrapping paper Ribbon, yarn, tissues Scissors Transparent tape Articles of merchandise	
1	Have the class read and discuss Instruction Sheet I. Have students practice preparing the box for gift wrapping.	Instruction Sheet I Articles of merchandise Boxes Tissue paper Scissors Working table	
2	Show the class how to prepare the transparent tape by making a circle of tape. It can then be attached under the flaps of the wrapping paper without showing on the outside. Have students practice wrapping a box.	Boxes Manila wrapping paper or grocery bags Transparent tape Scissors Working table	
3	Let each student choose one of the ribbon patterns and practice applying it to the package.	Wrapped boxes String Scissors Transparent tape Working table	

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LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Have the class study Instruction Sheet II. Let each student choose one of the bows and practice making it. (NOTE: Bows that meet your approval may be used in the Check-Out Activity.)	Instruction Sheet II Ribbon Yarn Tissues Working table	
5	Have students gift wrap an article of merchandise. Use the Instructor's Final Checklist to evaluate each package.	Square or rectangular boxes Items of merchandise Tissue paper Wrapping paper Ribbon, yarn, tissue (Bows made in Learning Activity 4) Scissors Transparent tape Working table Instructor's Final Checklist	

Instructor's Final Checklist

GIFT WRAPPING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's gift wrapped package:

	Accomplished	Not Accomplished
1. Was properly prepared prior to gift wrapping:		
a. The box was lined with tissue..................	☐	☐
b. The merchandise was cradled in the tissue.......	☐	☐
c. The tissue was folded over the merchandise......	☐	☐
d. The merchandise was not damaged.................	☐	☐
2. Was properly wrapped:		
a. The package was neat and clean..................	☐	☐
b. The paper fit snugly............................	☐	☐
c. The end flaps were folded under to form a smooth, straight line..........................	☐	☐
d. The tape was concealed under the flaps..........	☐	☐
3. Was attractively decorated:		
a. The ribbon and bow were suitable for the paper..	☐	☐
b. The ribbon and bow were securely attached to the package....................................	☐	☐
c. The bow was the appropriate size for the package..	☐	☐

BAGGING MERCHANDISE

OBJECTIVE

GIVEN an order of merchandise and paper bags,

BAG THE ORDER.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that bagging merchandise correctly can save the store money.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. BAGGING MERCHANDISE	1

Instructor's Final Checklist	
BAGGING MERCHANDISE	4

CHECK-OUT ACTIVITIES

You will be given bags and an order of merchandise.

Bag the order.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	You may have students bring the items listed at the right to class.	Suggested Supplies: Assortment of paper bags Boxes (that will fit in bags) Bottles Fragile and crushable items Small items (to fit among larger items) Soft items	
1	Have the class read and discuss Instruction Sheet I.	Instruction Sheet I	
2	Demonstrate for the class how to bag merchandise, OR Invite a resource person to demonstrate how to bag merchandise.	Supplies listed above Sales tickets Stapler Suggested Resource Persons: Bagger Salesperson Cashier-Checker	
3	Provide each student with a paper bag and an order of merchandise. Have him/her practice bagging the merchandise. Check each bag.	Supplies listed for Learning Activity 2	
4	Provide an assortment of paper bags. Give each student a few items of merchandise. Have him/her choose the correct size bag and bag the merchandise. Use the Instructor's Final Checklist to evaluate each bag.	Supplies listed for Learning Activity 2 Instructor's Final Checklist	

Instructor's Final Checklist

BAGGING MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In bagging an order of merchandise, the student:

	Accomplished	Not Accomplished
1. Chose the right bag size for the order	☐	☐
2. Placed heavy items in the bottom of the bag	☐	☐
3. Placed wide boxes on the side	☐	☐
4. Placed glass items in the center of the bag	☐	☐
5. Placed fragile items on the top of the bag	☐	☐
6. Placed small items between larger items	☐	☐
7. Divided heavy and light items evenly among the bags.	☐	☐
8. Did not fill the bags too full	☐	☐
9. Bagged the complete order	☐	☐
10. Folded over the top of the bag and stapled the sales ticket to the fold (if applicable)	☐	☐

TAKING TELEPHONE ORDERS

OBJECTIVE

GIVEN a telephone setup and a caller,

TAKE THE CALLER'S ORDER.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will learn to take telephone calls in a courteous manner.
--They will also strive to take complete and accurate information as it is given over the telephone.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. TAKING TELEPHONE CALLS	1
II. TAKING TELEPHONE ORDERS	3
Instructor's Final Checklist	
TAKING TELEPHONE ORDERS	5

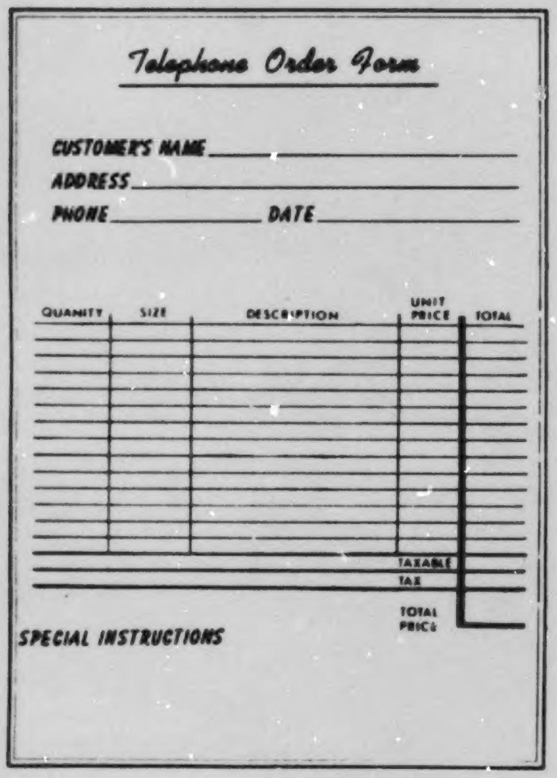
CHECK-OUT ACTIVITIES

Your instructor will provide a telephone setup and a caller.

Take the caller's order.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	It is recommended that you arrange for a telephone setup for use in taking telephone orders before beginning this task.	Toy telephones or teletrainer (Contact your local telephone company.)	
1	Have the class read and discuss Instruction Sheet I. Emphasize the importance of telephone courtesy.	Instruction Sheet I	
2	Have students work in pairs to practice taking a telephone call. They may check each other by using Instruction Sheet I. (If telephones are not available at this time, students may pretend they are using telephones.)	Telephones Instruction Sheet I	
3	Have the class read and discuss Instruction Sheet II.	Instruction Sheet II	
4	Prepare a price list of merchandise and duplicate copies or write on chalkboard. Duplicate copies of Telephone Order Forms. Have students work in pairs to practice taking a telephone order. (They may choose items to order from the price list.) Have them check each other by using Instruction Sheet II.	Telephones Price lists of merchandise Telephone Order Forms (Master copy is in this section.) Instruction Sheet II	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
5	Have pairs of students take turns ordering merchandise by telephone, OR Set up work stations in the classroom. Provide each station with the necessary supplies. Assign groups of students to each station. Have them take turns taking telephone orders. (Members of each group may check each other's telephone courtesy, and you may check the Telephone Order Forms.) Use the Instructor's Final Checklist to evaluate each students performance.	Telephone(s) Price lists of merchandise Telephone Order Forms Instructor's Final Checklist	



Telephone Order Form

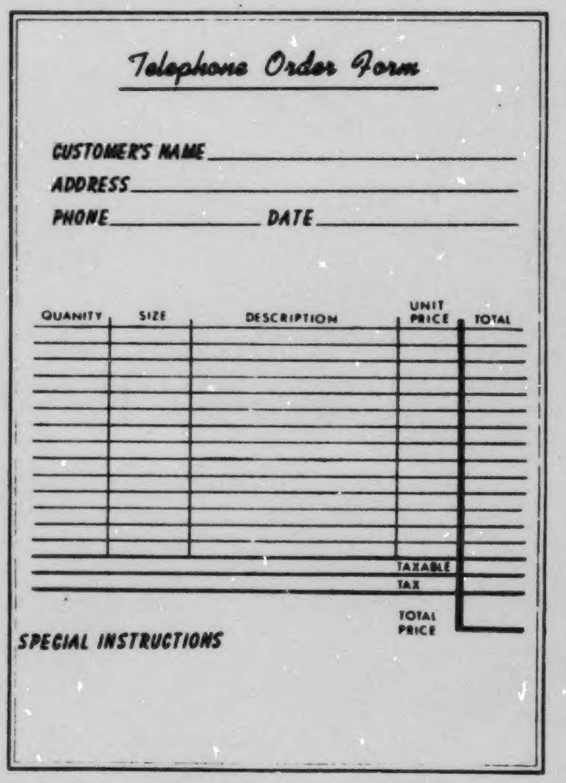
CUSTOMER'S NAME ____________________

ADDRESS ____________________

PHONE __________ **DATE** __________

QUANITY	SIZE	DESCRIPTION	UNIT PRICE	TOTAL
			TAXABLE	
			TAX	
			TOTAL PRICE	

SPECIAL INSTRUCTIONS



Telephone Order Form

CUSTOMER'S NAME ____________________

ADDRESS ____________________

PHONE __________ DATE __________

QUANITY | SIZE | DESCRIPTION | UNIT PRICE | TOTAL

TAXABLE

TAX

TOTAL PRICE

SPECIAL INSTRUCTIONS

Instructor's Final Checklist

TAKING TELEPHONE ORDERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In taking telephone order, the student:

	Accomplished	Not Accomplished
1. Observed telephone courtesy:		
a. Answered the telephone promptly.................	[ ]	[ ]
b. Identified the store, self, and offered help....	[ ]	[ ]
c. Spoke clearly in normal volume and tone.........	[ ]	[ ]
d. Spoke with a smile.............................	[ ]	[ ]
e. Avoided eating or chewing gum..................	[ ]	[ ]
f. Ended the call with a pleasant voice...........	[ ]	[ ]
g. Permitted the caller to hang up first..........	[ ]	[ ]
2. Took the order:		
a. Had a price list near the telephone............	[ ]	[ ]
b. Wrote the order:		
--Customer's name and address, spelled correctly...................................	[ ]	[ ]
--Customer's telephone number..................	[ ]	[ ]
--Current date.................................	[ ]	[ ]
--Quantity, size, and description of order......	[ ]	[ ]
--Cost of the merchandise......................	[ ]	[ ]
--Name and address of receiver of merchandise (when other than customer)..................	[ ]	[ ]
--Student's signature..........................	[ ]	[ ]
c. Read the complete order back to the caller......	[ ]	[ ]
d. Assured the customer the order would be promptly processed.............................	[ ]	[ ]

PREPARING PACKAGES FOR MAILING

OBJECTIVE

GIVEN merchandise and the necessary supplies,

PREPARE THE MERCHANDISE FOR MAILING.

YOUR MERCHANDISE must be packaged, wrapped, and addressed in accordance with the recommendations of the Postal Manual.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will realize that improperly prepared packages can cost a store money in damaged merchandise and that packages must meet postal regulations before they can be mailed.

CONTENTS OF MODULE

Instruction Sheets	Learning Activity Number
I. PACKAGING	1
II. WRAPPING	3
III. ADDRESSING A PACKAGE	5

Instructor's Final Checklist	
PREPARING PACKAGES FOR MAILING	7

CHECK-OUT ACTIVITIES

Turn in to your instructor the package you prepared for mailing.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	You may ask the students to bring the supplies listed at the right to class.	Suggested supplies: Items of merchandise Assortment of boxes Newspaper for wrapping and cushioning merchandise Heavy wrapping paper (Paper bags may be suitable) String Paper tape	
1	Have students read, study, and discuss each method of packaging.	Instruction Sheet I	
2	Let each student choose an item of merchandise and a suitable box. Have him/her package the merchandise, using the most appropriate method presented in Instruction Sheet I. Check each package to assure that the merchandise is securely packed.	Items of merchandise Boxes Newspaper Instruction Sheet I	
3	Have students read, study, and discuss the ways packages can be wrapped.	Instruction Sheet II	
4	Have each student wrap his/her package, using one of the methods presented in Instruction Sheet II.	Packages prepared in Learning Activity 2 Heavy wrapping paper Tape Stapler Instruction Sheet II	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Check each package for strength to assure that the string will not come loose or the box pop open.		
5	Have student read, study, and discuss how to address a package for mailing.	Instruction Sheet III	
6	Have each student address his/her package. Allow him/her to refer to Instruction Sheet III when necessary.	Packages wrapped in Learning Activity 4 Pens Instruction Sheet III	
7	Have students turn in their packages. Examine each one inside and outside. Use the Instructor's Final Checklist to evaluate each package. (NOTE: The recommendations of the Postal Manual are included in Instruction Sheets I, II, and III of this Task Assignment Sheet.)	Packages prepared by Instructor's Final Checklist	

Instructor's Final Checklist

PREPARING PACKAGES FOR MAILING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In preparing a package for mailing, the student:

	Accomplished	Not Accomplished
1. Packaged the item(s) in accordance with the recommendations of the Postal Manual.................	[ ]	[ ]
2. Used the packaging method most suitable for the item(s)...	[ ]	[ ]
3. Wrapped the package in accordance with the recommendations of the Postal Manual.................	[ ]	[ ]
4. Addressed the package in accordance with the recommendations of the Postal Manual.................	[ ]	[ ]

RECORDING PAYMENTS ON CHARGE ACCOUNTS

OBJECTIVE

GIVEN sales tickets, and three cases of customer payments on charge accounts,

RECORD EACH PAYMENT.

EACH PAYMENT must be recorded in the proper spaces on the sales ticket, be recorded accurately, and be readable.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that for stores to give proper credit for payments on charge accounts, it is imperative that the information be recorded legibly and accurately.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. RECORDING PAYMENTS ON CHARGE ACCOUNTS	1
Instructor's Final Checklist	
RECORDING PAYMENTS ON CHARGE ACCOUNTS	3

CHECK-OUT ACTIVITIES

Your instructor will provide sales tickets and three cases of customer payments on charge accounts.

Record each payment.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students read and study Instruction Sheet I. Discuss the parts of the sales ticket that are used in recording a payment on a charge account.	Instruction Sheet I	
2	Develop several cases of customer payments on account. Write them on the chalkboard. Duplicate several copies of the sales tickets for each student. (These will also be used in the Check-Out Activity.) Provide students one sales ticket for each case. Have the students record each payment. When they have finished, have the class discuss how payment should be recorded.	Cases of customer payments on charge accounts Sales tickets (Master copy is in this section.)	
3	Develop three cases of customer payments on account. Duplicate copies or write them on the chalkboard. Provide each student three sales tickets. Have each student record the payment for each case. Use the Instructor's Final Checklist to evaluate each student's work.	Cases of customer payments on charge accounts. Sales tickets Instructor's Final Checklist	

X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE ____________________

NAME ____

ADDRESS ____
STREET

____
CITY STATE ZIP CODE

SOLD BY CASH ☐ CHARGE ☐ REC. ON ACCT. ☐ PAID OUT ☐

Amount Received from customer ____________

Dept.	Quantity	Item	Unit Price	Amount	

ITEM TOTAL		
SALES TAX		
TOTAL		

Received by ______________________________________

All returns or adjustments must be accompanied by this receipt.

Instructor's Final Checklist

RECORDING PAYMENTS ON CHARGE ACCOUNTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In recording the three payments on charge accounts, the student:

	Accomplished	Not Accomplished
1. Recorded each payment on a sales ticket..............	[ ]	[ ]
2. Recorded the information in the proper spaces........	[ ]	[ ]
3. Recorded the information accurately..................	[ ]	[ ]
4. Recorded the information so that it is easy to read..	[ ]	[ ]

RECORDING CASH REFUNDS

OBJECTIVE

GIVEN a customer request for a cash refund and a Merchandise Refunds Form,

RECORD THE CASH REFUND.

THE INFORMATION should be recorded in the correct spaces on the Merchandise Returns Form, be recorded accurately, and be easy to read.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--The student will understand that the purpose of recording cash refunds is to make the cash register balance at the end of the day. Therefore, accuracy and legibility are tremendously important.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. RECORDING CASH REFUNDS	1
Instructor's Final Checklist	
RECORDING CASH REFUNDS	3

CHECK-OUT ACTIVITIES

Your instructor will provide a customer request for a cash refund and a Merchandise Returns Form.

Record the cash refund.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read and study the form in Instruction Sheet I. Discuss the parts of the Merchandise Returns Form.	Instruction Sheet I	
2	Duplicate copies of the Merchandise Returns Form for each student. (This form will also be used in the Check-Out Activity.) Develop requests for cash refunds, and write them on the chalkboard. Have students record the cash refunds on the Merchandise Returns forms. When the students have finished, discuss each cash refund request.	Merchandise Returns Form (Master copy is in this section.) Requests for cash refunds	
3	Develop a request for a cash refund, and duplicate or write it on the chalkboard. Provide each student a Merchandise Returns Form. Have students record the cash refund. Use the Instructor's Final Checklist to evaluate each form.	Merchandise Returns Forms Request for cash refund Instructor's Final Checklist	

MERCHANDISE RETURN FORM

X-Company

MERCHANDISE RETURNS

DATE

MDSE. RETURNED:	Amount	
AMT. OF REFUND:		
AMT. OF TAX:		
REFUND TOTAL		

Reason for refund: ____

NAME

ADDRESS

CITY	STATE	ZIP

Customer's Signature ____

Manager ____

X-Company

MERCHANDISE RETURNS

DATE

MDSE. RETURNED: Amount

AMT. OF REFUND:

AMT. OF TAX:

REFUND TOTAL

Reason for refund: ____

NAME

ADDRESS

CITY STATE ZIP

Customer's Signature ____

Manager ____

Instructor's Final Checklist

RECORDING CASH REFUNDS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In recording cash refunds, the student:

	Accomplished	Not Accomplished
1. Recorded the information in the correct spaces on the Merchandise Returns Form......................	[ ]	[ ]
2. Recorded the information accurately..................	[ ]	[ ]
3. Recorded the information so that it is easy to read..	[ ]	[ ]

PREPARING THE CASHIER'S REPORT

OBJECTIVE

GIVEN a cash drawer, sales tickets, and a Cashier's Report Form,

PREPARE THE CASHIER'S REPORT.

YOUR REPORT should be accurate, neat, and easy to read.

OR

GIVEN a problem dealing with money handled for the work day, and a Cashier's Report Form,

PREPARE THE CASHIER'S REPORT

YOUR REPORT should be accurate, neat, and readable.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will become aware that a business should be able to account for every penny taken in as well as paid out.
--They will also realize that cashiers are responsible for accurately balancing their cash drawer.

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. THE CASHIER'S REPORT	1
Student Self-Check	
I. PREPARING A CASHIER'S REPORT	2
Instructor's Final Checklist	
PREPARING THE CASHIER'S REPORT	3

CHECK-OUT ACTIVITIES

Your instructor will provide a cash drawer, sales tickets, and a Cashier's Report Form,

OR

Your instructor will provide a problem dealing with money handled for the work day and a Cashier's Report Form.

Prepare the Cashier's Report.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have students study Instruction Sheet I. Discuss each part of the Cashier's Report Form. Explain "Beginning Cash," (the cash put in the cash drawer at the beginning of the work day to be used for change). A written statement of the amount is put in the cash drawer. Demonstrate how to figure "Cash Short" and "Cash Over." (The Total Cash in Drawer should equal Beginning Cash plus Sales Tickets. When the Cash in Drawer is less than the total Beginning Cash and Sales Tickets the cash is "Short." The cash is "Over" when there is more cash in Drawer than the total of Beginning Cash and Sales Tickets.) To add variety to this task, you may have students interview cashier's concerning their end-of-the-day cash reports, and let them report to the class.	Instruction Sheet I Cashiers	
2	Duplicate at least two copies of the Cashier's Report Form for each student. (One will be used for the Check-Out Activity.)	Cashier's Report Form (Master copy is in this section.)	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	Have students work the problem in Student Self-Check I. When they have finished, discuss each entry on the Cashier's Report.	Student Self-Check I	
3	Set up work stations in the classroom. Provide each station with: (1) a cash drawer. (You may use the ones prepared for Task Assignment Sheet PA-MD-22, "Getting the Cash Drawer Ready for Business.") Be sure to include a statement of Beginning Cash. (2) Sales tickets, and (3) a Cashier's Report Form. Assign students to each work station, and have each group prepare a Cashier's Report. (Some students can count coins, others can count bills, others can record the amounts, and others can figure totals.) OR You may prepare a problem similar to the one in Student Self-Check I and have each student prepare a Cashier's Report. Use the Instructor's Final Checklist to evaluate each Cashier's Report.	Cash drawer Play money Sales tickets Statement of Beginning Cash Cashier's Report Form Instructor's Final Checklist	

CASHIER'S REPORT

Date ____________________

Pennies.. __________

Nickles.. __________

Dimes.. __________

Quarters... __________

Half Dollars... __________

Silver Dollars... __________

Paper Bills.. __________

Total Cash in Drawer... __________

Beginning Cash __________

Sales Tickets __________

Total Cash Handled __________

Cash Short __________

Cash Over __________

Cashier's Name ____

Instructor's Final Checklist

PREPARING THE CASHIER'S REPORT

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student Cashier's Report was:

	Accomplished	Not Accomplished
1. Accurate	☐	☐
2. Neat	☐	☐
3. Easy to read	☐	☐

PREPARING STOCK FOR INVENTORY

OBJECTIVES

GIVEN a supply of stock with price tickets attached and an Inventory Sheet,

PREPARE AND LIST THE STOCK FOR INVENTORY.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN):

--Students will realize that in order to take a complete and accurate inventory, the stock must be properly prepared and listed.

CONTENTS OF MODULE

	Learning Activity Number
Instruction Sheets	
I. PREPARING AND LISTING THE STOCK FOR INVENTORY	1
Instructor's Final Checklist	
PREPARING TO TAKE INVENTORY	5

CHECK-OUT ACTIVITIES

Your instructor will provide a supply of stock and an Inventory Sheet.

Prepare and list the stock for inventory.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I and discuss each point presented.	Instruction Sheet I	
2	Demonstrate how to divide and group stock for inventory. Change prices on a few price tickets, explaining that original price is no longer current.	A small supply of stock with price tickets attached	
3	Set up work stations in the classroom. Furnish each station a small supply of stock with price tickets attached. Assign a small group of students to each station. Have them practice dividing and grouping the stock.	Several small supplies of stock with price tickets attached	
4	Make a transparency of a layout chart, or draw one on the chalk board. Discuss each section of the chart.	Illustration of a layout chart	
5	Duplicate several copies of the Inventory Sheet. Set up several work stations in the classroom. Furnish each station with a small supply of stock with price tickets attached and an Inventory Sheet. Assign a small group of students to each station. Have the students group	Inventory sheet (Master copy in this section) Small supplies of stock with price tickets attached Instructor's Final Checklist	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
	the stock, make a master list of the stock, make a layout chart. Use the Instructor's Final Checklist to evaluate each group's work. (Note: The prepared stock and the master lists will be used in the next task assignment sheet.)		

Check-Out Activity

INVENTORY

WORK STATION____________________ MONTH ENDING____________________

TAKEN BY____________________

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL PRICE

TOTAL RETAIL VALUE ________________

Instructor's Final Checklist

PREPARING STOCK FOR INVENTORY

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In preparing stock for inventory, the group of students:

	Accomplished	Not Accomplished
1. Divided and grouped the stock according to type, style, and price	[ ]	[ ]
2. Changed the prices on the price tags to current market prices, when necessary	[ ]	[ ]
3. Made a master list of the different kinds of inventory	[ ]	[ ]
4. Arranged the stock in the sequence listed on the Inventory Sheet	[ ]	[ ]
5. Made a layout chart of the stock to be inventoried	[ ]	[ ]

Instructor's Guide Sheet Task Assignment Sheet PA-MD-41

TAKING INVENTORY

OBJECTIVE

GIVEN stock prepared for inventory and an Inventory sheet with a master listing of the inventory,

COUNT THE ITEMS OF STOCK AND COMPLETE THE INVENTORY SHEET.

THE COMPLETED INVENTORY SHEET should include the quantity, unit price, and total price for each type of stock described. It should also include the total retail value of the stock inventoried.

ATTITUDES AND VALUES TO BE DEVELOPED IN THIS MODULE (AFFECTIVE DOMAIN)

--Students will understand that a business person bases many important decisions on the information obtained from an inventory

CONTENTS OF MODULE

Instruction Sheet	Learning Activity Number
I. STEPS IN TAKING INVENTORY	1
Instructor's Final Checklist	
TAKING INVENTORY	4

CHECK-OUT ACTIVITIES

Your instructor will provide an Inventory sheet and a supply of stock prepared for inventory.

Count the items of stock and complete the Inventory sheet.

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
1	Have the class read Instruction Sheet I. Discuss each step in taking an inventory.	Instruction Sheet I	
2	Demonstrate how to count stock. (You may use the stock prepared for inventory at one of the work stations in the previous sheet.) Starting at the left of the table or shelf count the stacks of merchandise. Move from left to right. Record the information on the Inventory sheet.	A supply of stock prepared for inventory Transparency of an Inventory sheet with a listing of stock	
3	On the chalk board write a master list of stock showing the unit price for each type of stock. Duplicate an Inventory sheet for each student, or have him/her draw one on his/her own paper. Have the students complete the Inventory sheet using the information on the chalk board. Go over the correct answers when students have finished their work.	Master list of stock Blank Inventory sheet (Master copy in previous task assignment sheet.)	

LA#	NOTES AND SUGGESTIONS FOR INSTRUCTION	REFERENCES AND SPECIAL TOOLS AND EQUIPMENT	TEACHER'S NOTES
4	Duplicate copies of the Inventory sheets prepared by each work station in the previous task assignment sheet. Assign students to the work stations and provide them with the appropriate master lists. Have each student take inventory of the stock in the assigned work station and complete the Inventory sheet. Use the Instructor's Final Checklist to evaluate each Inventory sheet.	Inventory sheets with master stock lists (prepared in Task Assignment Sheet PA-MD-40) Stock prepared for inventory (Task Assignment Sheet PA-MD-40) Instructor's Final Checklist	

Instructor's Final Checklist

TAKING INVENTORY

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
The student's completed Inventory sheet included:		
1. The correct quantity of each type of stock...........	[ ]	[ ]
2. The correct unit price for each type of stock........	[ ]	[ ]
3. The correct total amount for each type of stock......	[ ]	[ ]
4. The correct total retail value for all the stock inventoried..	[ ]	[ ]

APPENDIX

PRACTICAL ARTS VIDOETAPES

These videotapes are available through the Kentucky Department of Education, Division of Materials and Curriculum, 19th Floor, Capital Plaza tower, Frankfort, Kentucky 40601; Telephone: (502) 564-2000.

Agribusiness, Natural Resources and Environmental Occupations

"Coal: Kentucky's Ace in the Hole": 1/2-inch color cartridge; 23 minutes; some on 1/2-inch reel-to-reel; 2 copies on 3/4-inch cassette. Describes types of occupations available in the coal industry and discusses useful coal by-products.

"Wildlife": 3/4-inch color cassette; 25 minutes. Explains the role of wildlife in conservation.

"Energy Careers": 1/2-inch color cartridge; 15 minutes; some on 1/2-inch reel-to-reel; 2 copies on 3/4-inch cassette. Explores careers in the alternative energy areas of solar energy, wind, and coal liquification.

"Agribusiness": 3/4-inch color cassette; 18 minutes. Deals with careers in agriculture and other farm-related careers.

Business and Office Occupations

"One Moment, Please": 1/2-inch color cartridge (2 cartridges available); 18 minutes. Explores occupations, ranging from camera operator to producer, available in radio and television production and necessary qualifications.

"Number, Please": 3/4-inch color cassette; 18 minutes. Discusses careers available in the telephone industry and shows on-the-job interviews for jobs in the industry.

"Roll the Presses": 3/4-inch cassette; 19 minutes, 20 seconds. Gives overview of careers needed to produce a newspaper.

Construction Occupations

"Construction Careers": 1/2-inch color cartridge; 20 minutes; some on 1/2-inch reel-to-reel; 2 copies on 3/4-inch cassette. Explores types of occupations, including carpenters, electricians, and plumbers, in construction careers and necessary skills needed for these careers.

Home Economics Occupations

"Gainful Home Economics": 3/4-inch color cassette; 20 minutes, 45 seconds. Describes occupations related to home economics in which people are gainfully employed.

Health Occupations

"RX Good Health": 1/2-inch color cartridge; 23 minutes, 2 copies on 3/4-inch color cassette. Explores health careers, such as medical secretary, laboratory technician, and physical therapist, in addition to doctor and nurse.

Hospitality and Recreation Occupations

"Hospitality Unlimited": 1/2-inch cartridge tape; 16 minutes; color; also on 1/2-inch reel-to-reel; 2 copies of 3/4-inch cassette. Identifies careers in the restaurant industry and hotel/motel management.

Manufacturing Occupations

"Down the Assembly Line": 3/4-inch cassette; 18 minutes. Depicts production line workers on the job; introduces students to the division of labor system whereby each worker becomes skilled in a single operation.

Orientation to the World of Work

"The Rest of Your Life": 3/4-inch cassette; 30 minutes. Introduces students to step-by-step procedures necessary in seeking employment.

Personal Service Occupations

"Barbering and Cosmetology": 3/4-inch cassette. Explores careers available in these two areas.

Public Service Occupations

"Dear John Mail": 1/2-inch color cartridge; 20 minutes; 2 copies on 3/4-inch color cassette. Explores the types of postal careers and available postal facilities.

"Law Enforcement": 3/4-inch color cassette; 25 minutes. Presents occupations available in law enforcement careers, ranging from policeman to radio operator, and their functions; also identifies necessary qualifications for entering the occupations.

"Military": 3/4-inch cassette; 17 minutes, 30 seconds. Gives students an overview of various careers associated with the military.

Transportation Occupations

"Tracking A Trucker": 1/2-inch cartridge tape; 22 minutes; color; some on 1/2-inch reel-to-reel; 2 copies on 3/4-inch cassette. Explores occupations needed to support the trucking industry from mechanic to driver.

"The People of the Airlines": 3/4-inch cassette; 22 minutes. Shows people on the job at the airport and on the airplane.

REFERENCES APPROPRIATE FOR CAREER EXPLORATION

Documents

Exploring Careers, 1979
Bulletin 2001
Bureau of Labor Statistics
1371 Peachtree Street, N.E.
Atlanta, GA 30309
Telephone: (404) 881-4418

Occupational Outlook Handbook
Bulletin 1955
Superintendent of Documents
U.S. Government Printing Office
Washington, DC 20402
(Cloth Cover) Stock No. 029-001-02067-8
(Paper Cover) Stock No. 029-001-02059-7

Dictionary of Occuaptional Titles
Superintendent of Documents
U.S. Government Printing Office
Washington, DC 20402
Stock No. 029-013-00079-9

Sources of Information

Practial Arts Unit
Bureau of Vocational Education
21st Floor
Capital Plaza Tower
Frankfort, KY 40601
Telephone: (502) 564-3472

Gregg/McGraw-Hill
Webster Division
1221 Avenue of the Americas
New York, NY 10020

McKnight Publishing Company
Bloomington, IL 61701

New Jersey Vocational Technical
Curriculum Laboratory
Rutgers University
4103 Kilmer Campus
New Brunswick, NJ 08903

Ohio Department of Education
Division of Vocational Education
Career Development Service
Columbus, OH 43215

Superintendent of Documents
U.S. Government Printing Office
Washington, DC 20402

Xerox Educational Publications
P.O. Box 16629
Columbus, OH 43216

ADDRESSING STUDENTS WITH SPECIAL NEEDS

Some students may need special help in achieving competency. Ideas are presented here for helping identify those students and modifying materials and techniques to help them succeed.

Identifying Students with Special Needs

Generally speaking, those students who cannot succeed in the regular vocational education programs without special help are termed "students with special needs" (Vocational Education Act of 1963 and Amendments). Persons most likely to be identified as students with special needs are the academically and economically disadvantaged and the handicapped--the mentally retarded, deaf and hard of hearing, speech impaired, emotionally disturbed, orthopedically (physically) impaired, health impaired, and learning disabled.

The handicapped are further identified as those (1) with a physical or mental disability that substantially impairs one or more major life activity--walking, seeing, hearing, speaking, working, or learning; (2) who have a record or history of such impairment or condition; and (3) are regarded as having an impairment (Rehabilitation Act of 1973). Women, minorities, the limited English speaking, and others likely to be underemployed or striving for equal opportunity in employment, when meeting the criteria for academic or economic deprivation, are specifically identified in the disadvantaged group to be given special help.

Formulating a Basic Approach to Teaching

Society recognizes the right of every individual to an appropriate education, and the law mandates giving persons with special needs an equal chance. In brief:

1. The Vocational Education Amendments of 1976 give special emphasis to developing and providing programs of vocational education for "those with special educational handicaps" and reserves moneys to do so.

2. The Education for All Handicapped Children Act of 1975 assures that all handicapped children between the ages of three to twenty-one have available to them a free, appropriate public education which relates to their unique needs and is provided in the least restrictive environment.

3. The Rehabilitation Act of 1973 prohibits discrimination on the basis of handicap in any program or activity receiving federal financial assistance and directs employers to take affirmative action in hiring handicapped people.

4. The Education Amendments of 1972 prohibit discrimination on the basis of sex in educational programs receiving or benefiting from federal financial assistance.

5. The Civil Rights Act of 1964 prohibits discrimination in employment on the basis of sex, race, color, religion, or national origin in any program or activity receiving federal financial assistance--including training for employment.

We must, then, provide equal opportunity to learn in our instructional processes.

Basically, an approach to teaching which recognizes individual differences in all students provides the best atmosphere for disadvantaged and handicapped students. This approach allows students to work at different rates; involves large group, small group, and individual instruction; incorporates a variety of instructional materials, media, and teaching techniques; and involves a variety of learning activities--reading, doing, discussing, listening, viewing, experiencing, sharing, cooperating, relating, using the senses, etc. It gives disadvantaged and handicapped students the dignity of exploring, learning, and facing the same experiences and responsibilities as other students, without limiting their possibilities by stereotyped concepts of what they can or cannot do.

It involves being organized, with students completely familiar with the teaching/learning plan. When beginning a CBVE class, for example, explain what learning to attain competencies means, how the students will carry out their work, how to use the materials, where to find materials, how and when tests will be given, how "passing" or competency is determined, and what your role as a teacher is.

It also means teacher direction for those students who are not self-directed learners--those with poor academic backgrounds who thrive on teacher interaction and need immediate feedback, instruction simplified, procedures modified, social development as well as specific job skills, role models, or other special aid. For these students, the learning activities described in the materials may become the teacher's lesson plan and utilized in large-group and small-group settings before the individual student attempts doing learning activities alone. The teacher-directed class might proceed as follows: teacher introduction to tasks to be performed, explanation of what is to be learned and why, presentation of information in small chunks, demonstration of how, student tryout and practice, time for questions and answers, trial test followed by reteaching, and evaluation. The teacher will employ a variety of strategies to address the learning needs and styles of the student.

Using Special Strategies

In order to determine the most appropriate teaching strategies, assess the class for kinds of special help required, and develop a plan for meeting any unique needs. Refer to Mainstreaming Guidebook for Vocational Educators by Dahl, Appleby, and Lipe, Olympus Publishing Company, Salt Lake City, Utah 84105, for modifications and general classroom strategies for meeting the unique needs of the different handicapped populations.

Also, enlist the advice and help of employers, support personnel, and agencies and organizations serving disadvantaged and handicapped populations in your school system and geographic area.

Redirecting Teaching Strategies Usually Used

Many of the strategies usually used with regular students may be redirected or modified and also provide effective learning activities for students with special needs. An explanation of how this many be done follows.

AUDIO-VISUALS (films, filmstrips, slide/tape, videotapes, and ETV and commercial television programs). The combination of sight and sound provides more effective communication than either sight or sound alone. Audio-visuals may be used to supplement or replace other methods of presenting information. The hearing impaired will require captioning, signing, or a printed script written at the appropriate reading level or presenting only essential details. The visually impaired may glean information from the sound source, but additional explanation will need to be provided for any visual display of information which is not explained adequately by the narration. Some audio-visual presentations, particularly 8 mm and 16 mm films, may move too fast for the information to be grasped and need to be evaluated with this in mind.

CONTACT WITH WORK ENVIRONMENT. Handicapping conditions, limited finances, geographic isolation, cultural difference, limited communication skills, and social isolation have caused disadvantaged and handicapped persons to have little contact with the world of work. Familiarity with the work setting in which a particular job takes place, relationships with other workers, business use of the telephone, relationship of one's job to other jobs in the same business are just a few examples of areas where special students may require special exposure by means of field trips, spending a day on the job, viewing films, or having additional training sessions.

NOTE: For those with physical impairments, field trips, on-site job observations, and work experience opportunities will be limited to "accessible" businesses in the community. Before deciding where to go, determine whether the facilities are accessible.

DEMONSTRATION AND TRYOUT. Demonstration by teacher, experienced workers, and previously trained students provide reliable role models for learners. Steps, procedures, precautions, physical manipulation, and techniques are imprinted visually in the order and at the time they should occur in task performance. Immediate tryout of the task following the demonstration or an immediate attempt of each step, technique, or procedure as it is demonstrated provides students direct involvement, permits correction and clarification, and promotes retention. Tryout also identifies areas in performance steps, techniques, tools, and work environment where handicapped students need to have modification in order to perform tasks and meet industry standards.

ELIMINATION OF STEREOTYPING. Disadvantaged and handicapped people face more than the sex role stereotyping myths in their quest for employment. The following are just a few examples: "Deaf people are dumb." The best job for blind people is tuning pianos." "He'll never be able to do that; he's a cripple." "Mr. ______ was no good; so will be his son." "She can never do that; her parents didn't go to college." In addition to overcoming the unfounded assumptions of others, disadvantaged and handicapped often have equal misconceptions about themselves thinking: "I can never do that." "_____, who is deaf does assembly line work; that's what I'll do, too." "I'll never be anybody."

Overcoming stereotyping may begin with using sex fair instructional materials and media, exploring interests and abilities, exploring two or three nontraditional jobs, or complimenting accomplishments. It may include planning how to reach an educational goal, providing role models (person with like handicap or socioeconomic background who has succeeded), as well as observing persons in nontraditional work roles. It means doing whatever raises aspirations and increases self-worth. It means attempting to eliminate underemployment.

EMPLOYER INVOLVEMENT. Programs with employer input are more practical and in line with the current needs of the job market. Employers who make input feel a special kinship to the program and get a chance to see the students before meeting them in the job market.

For disadvantaged and handicapped students, employer involvement offers a very special opportunity to remove common misconceptions about their capabilities. It enables employers to help with any modification needed, see students performing tasks, and observe how the students relate to others. It gives students a chance to prove that they can do the work, that they will not endanger themselves or others, and that they will not increase expenses. These are major employer concerns. Both students and teachers should be prepared to provide reassuring answers and evidence to show there is no more risk than with the nonhandicapped.

Employers may be involved by giving class presentations; giving suggestions for program improvement and modifications; conducting mock interviews; and providing work experience, observations and worker interviews, job analysis, etc.

HANDS-ON EXPERIENCES: PROBLEM SOLVING: PERSONAL INVOLVEMENT (work samples, tryout exercises, games, role playing). Being involved in a sample of work through completing a product, performing related paper work, or role playing interpersonal relationships on the job keeps students interested, holds attention to the learning tasks, and injects the realities of working and job performance in the teaching/learning situation. It makes the student feel that the instruction is practical and valuable. Accomplishment means "qualified for work"--a great boost to self-esteem for those who doubt self-worth.

The instructor and other students should avoid taking over when handicapped students are awkward or slow in completing a task. The student cannot master the skill if someone else does it.

ILLUSTRATIONS (pictures, graphs, bulletin boards, transparencies, and other visuals). The disadvantaged, the mentally retarded, and the hearing impaired, particularly, are especially oriented to visual methods of learning. Other students, with the exception of the blind and some visually impaired, will appreciate visual presentation of information to be learned. Student handouts, with the steps to a task illustrated and briefly and simply explained, are especially helpful. Captioning and brief explanations are important supplements. Many illustrations may be adapted for the visually impaired by making them tactile (so that they can be felt). Sometimes enlarged print and bold outlines help.

INTERACTION; INDEPENDENCE. Economic deprivation, geographic isolation, cultural isolation, and restrictions on mobility and social relationships imposed by physical impairments have limited the experiences of the disadvantaged and the handicapped in the community at large. Many have no previous work experience, little observation of the worker's daily routine, and limited social experiences. They have been sheltered at home, absent from the scene, at best onlookers.

So that they will not continue in this role after vocational training, experiences in the community and involvement with nonhandicapped people and other students are of utmost importance. These students, as well as their families and the working community, need proof that they can function independently and competently. They need to establish contacts who can serve as references to recommend them as competent workers who can relate to others.

Field trips, worker interviews, cooperative work experience, spending a day on the job, giving talks before civic groups are, therefore, important to the acclimation of disadvantaged and handicapped students to the world of work. Participating in team work projects with other students; pairing with a slower or faster learning peer; pairing with a nonhandicapped, a nondisadvantaged, or person from another race or culture will help faster understanding and promote learning communication skills. Teaching special units dealing with related communication and social skills will also be necessary; for example: office etiquette, relationships with employer and other employees, daily work expectations which are not direct task performance, telephone skills, appropriate dress and grooming habits, to name a few.

LISTENING (explaining, discussing, reacting orally). Learning by listening is an important tool to the disadvantaged, the visually impaired, speech impaired, learning disabled, and others who "prefer to be told" or "have to be told" rather than read about it.

The visually impaired require identification of familiar sounds in the work place to determine location of different work areas, equipment functions, and hazards. The hearing impaired require sight substitutions, such as indicator lights, for critical sounds they cannot hear. They may use lip reading, interpreting, and sound conduction or amplification devices. The retarded need to become accustomed to the sounds of the work place so that they can work without being distracted. The speech impaired need to be accorded the right to listen although they may have trouble participating, or not be able to participate orally.

When information is presented for listening, instruction in how to listen (what to listen for) is important. An outline of the information presented, supplemented by visuals, tryout exercises, showing, completion of a guidesheet questions to be answered, analysis of cases or problem situations, or other application activities will enhance use and retention of information heard.

Listening is a vocational skill as well as a learning skill. Workers must be able to receive information by listening as well as provide information for listening. Most on-the-job instruction is given orally. Explanation must be given to and received from customers, co-workers, and supervisors.

READING HELPS. Being fluent in the technical vocabulary or language of the job and able to read at the level required by the job is a part of occupational competency. On-the-job reading requirements may vary from the reading of signs to following instructions given in technical manuals. The instruction given in reading, then, for vocational purposes, will depend on the reading skills possessed by the student and the reading requirements of the job. Whether or not a supplemental class in remedial reading is offered, the vocational instructor will find providing reading helps also helps provide job skill.

Braille materials, large print textbooks, magnifying devices, and recordings may be provided for the visually impaired. Materials may be simplified or outlined for the hearing impaired and others with limited language skills. The native language may be supplied above the English for critical information in textbooks used by the limited English-speaking. Familiarity with the setting in which the printed information is applied may be given via field trips, demonstrations, or films to make reading easier and more meaningful.

Students with exceptional reading problems may require the help of a special reading teacher or be enrolled in a remedial reading program. Some schools employ vocational reading teachers to assist vocational students with developing vocational reading skills and doing the reading required in their programs.

RECORDING AND RECORDINGS (tapes, records, radio programs). Information may be presented and gained by listening to recorded information rather than reading. This strategy will aid the nonreader, the poor reader, the visually impaired, the learning disabled, and others through use as a variation of teaching technique. Recording is also a useful tool for the deaf in notetaking; the recording script may be transcribed into print later by a hearing individual. It will also provide instruction for those who have missed initial classroom presentation of information or who need review. Recordings may be supplemented by slides and pictures.

RELATED MATH. Competency in math, like competency in reading, is more critical to some jobs than to others. Math is best taught in relation to the task of which it is a part. This instruction should incorporate basic math and remedial math instruction as needed. A cooperative or team teaching effort with the math teachers or related math instructors in the school will relieve the burden on the vocational instructor. Enough practice and application exercises should be provided to insure retention of the math operations involved. It is helpful to compile a list of the math competencies needed to complete the training program, prepare an assessment test to determine student skills, and plan in the beginning a program which the student can follow to attain the basic math competencies prerequisite to the course. If the skills cannot be acquired simultaneously to the job skill training program, the student should postpone entry into the course until the prerequisite skills are attained. It may be necessary to prepare a special manual and modules to provide the related math instruction.

REMEDIAL AND RETENTION EXERCISES. Doing learning activities does not necessarily make students occupationally competent. Performance must be observed, misunderstandings clarified, procedures and techniques corrected, and repetition called for at a future time. Lesson planning should anticipate theory and tasks with which students are likely to have difficulty, include additional practice exercises, and provide alternate approaches to teaching. Repetition for retention should be provided, such as repetition of information in different media presentations or use of different types of application exercises. Review sessions, keeping notebooks, completing work samples, doing live work, and solving cases will also help.

SAFETY. The Occupational Health and Safety Act has increased employer concern for safety and underscored the importance of providing safety instruction along with task performance. It is especially important for the handicapped in two ways: (1) to overcome employer concern about the handicapped person's ability to take care of himself/herself and not endanger the lives of others; (2) to identify and deal with situations which are hazardous for persons because of particular handicaps.

To meet these needs for safety instruction, the handicapped student not only needs the basic or general safety instruction related to the occupation but safety instruction or special safety provisions needed for a person with his/her particular handicap. An example is the installation of a blinking light to tell a person who is deaf that equipment is running.

NOTE: The Kentucky Department of Labor, Occupational Safety and Health Program, Division of Education and Training, Frankfort, Kentucky 40601, Phone: (502) 564-6895, offers training programs to help vocational instructors teach safety.

SUPPORT SERVICES. Some students will require emotional, social, and financial support in order to succeed in the instructional programs. Others will need career counseling and special assistance in becoming employed. Government agencies, special schools, special personnel, and organizations for disadvantaged and handicapped persons can provide this help. The following are examples and should not be considered an all-inclusive list: resource room teachers, rehabilitation counselors, guidance counselors, tutors, remedial teachers, instructors in special schools, occupational therapists, diagnostic specialists, media personnel, handicapped workers, workers who are members of a minority group, social workers, and others who can serve as role models. Survey the community to identify who serves the needs of disadvantaged and handicapped persons in your area and incorporate their assistance in related learning activities.

UNIQUE MODIFICATIONS (modified equipment, tools, learning aids, changes in work environment, adaptations in course or training program content). Some students require special help in meeting physical job requirements. When considering modification, it is important to concentrate on what the student can do. If at all possible, enable the student to function in the work environment as it is usually found. Employers look favorably on handicapped persons with this kind of preparation.

Rehabilitation centers; organizations and schools for the blind, deaf, dyslectic, disabled, and the mentally handicapped; and publishers and manufacturers of special instructional materials, aids, and equipment can offer aid in meeting unique needs. Consultation with special education personnel and rehabilitation counselors is a good starting point. The student should also be asked to make suggestions.

Care should be taken to insure occupational competency. Prospective employers should be shown how the modification operates in the work setting and how it increases efficiency.

The previously described list of strategies is not exhaustive. Others may be added. All will need to be directed toward the occupation for which training is being given, the students enrolled, the availability of instructional materials, and the community. It is also important to remember that what works well for one group of students or a particular student will not necessarily work well for another.

PRACTICAL ARTS

MARKETING AND DISTRIBUTION OCCUPATIONS

MODULES 1-41

Task Assignment Sheet PA-MD-1
Store Owner/Manager

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: MAKING A MARKET RESEARCH QUESTIONNAIRE

INTRODUCTION

As you go through this occupational cluster, you will learn to perform some of the basic activities in operating a store--specifically a school bookstore. Good store managers, before opening a store, conduct marketing research--gathering information from other people. They often use a questionnaire, and base their decisions on its results. In this task assignment sheet you will learn how to make a market research questionnaire.

OBJECTIVE(S)

GIVEN three problems and a basic questionnaire outline,

MAKE A MARKET RESEARCH QUESTIONNAIRE. USE MULTIPLE CHOICE, TRUE/FALSE, OR RATING SCALE-TYPE QUESTIONS.

YOUR QUESTIONNAIRE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. FIND samples of questionnaires and bring them to class. DISCUSS the kinds of questions asked.
2. READ and DISCUSS Instruction Sheet I, PLANNING A MARKET SURVEY. ANSWER the questions in Item 3.
3. READ and DISCUSS Instruction Sheet II, DESIGNING A QUESTIONNAIRE. LOOK AT a sample of a questionnaire for a school store. Your teacher will show you one.
4. ARRANGE with your teacher to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your teacher will give you a copy of the problems and a basic questionnaire outline.

Use the outline as a guide in making a market research questionnaire.

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Instruction Sheet I

PLANNING A MARKETING RESEARCH QUESTIONNAIRE

In planning a market research questionnaire, there are at least three important points to consider.

1. What are the problems for this task assignment sheet?
    a. The major problem is: Should we open a school bookstore?
    b. The minor problems are: During what hours of the day should the store be open? What merchandise should we carry? What services should we offer?
2. What is the goal of the questionnaire? To get information from possible customers that will help you make decisions regarding the problems stated above.
3. How can I design a questionnaire that will outline exactly what is needed?
    a. What personal information do I need about each possible customer? (Age, sex, position in school, etc.)
    b. What can I ask the customer that will help me determine whether or not to open a store?
    c. What can I ask the customer that will help me decide what goods to offer?
    d. What can I ask the customer that will help me decide what services to offer?

Instruction Sheet II

DESIGNING A QUESTIONNAIRE

In developing questions for a questionnaire, there are several questions that should be considered:

1. Is the question necessary? What actions will result from this information?
2. Is the question too involved? Are several questions required in place of a long one?
3. Does the customer have the information in order to answer the question?
4. Can the target customer readily remember the information asked for?
5. Will the target customer have to do a lot of work to get the information?
6. Will the target customer be willing to answer the questions?

There are several types of questions that can be used in a questionnaire:

1. Open-End: "Where do you usually buy school supplies?"
2. Multiple Choice: "What types of supplies should be offered in a school store?"
3. True/False: A store is needed in our school. True _____ False _____
4. Rating Scale: "A store is needed in our school." Strongly Agree _____ Agree _____ Disagree _____ Strongly Disagree _____

Instructor's Final Checklist

MAKING A MARKET RESEARCH QUESTIONNAIRE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's market research questionnaire included:	Accomplished	Not Accomplished
1. A title	☐	☐
2. The problems to be solved	☐	☐
3. Directions for filling out the questionnaire	☐	☐
4. Question(s) for each of the six information topics listed on the basic outline:		
a. Multiple choice	☐	☐
or		
b. True/False	☐	☐
or		
c. Rating scale	☐	☐
5. Directions for returning the completed questionnaire.	☐	☐

Task Assignment Sheet PA-MD-2
Store Owner/Manager

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: CONDUCTING A MARKET SURVEY

INTRODUCTION

When a useable market research questionnaire has been made, store owners conduct a survey of possible customers. Each customer is asked to complete the questionaire. In this task assignment sheet, you will conduct a market survey.

OBJECTIVE(S)

USING THE MARKET research questionnaire you made in Task Assignment Sheet PA-MD-1,

CONDUCT A MARKET SURVEY.

TEN PEOPLE should be surveyed.

LEARNING ACTIVITIES

1. MAKE at least eleven copies of your market research questionnaire.
2. LIST ten people in your school whom you consider target customers. DELIVER a copy of a questionnaire to each person and have him/her write the answers to the questions; or INTERVIEW each one personally, and write his/her answers on the questionnaire.
3. ARRANGE with your teacher to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Turn in the ten completed questionnaires to your teacher.

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Instructor's Final Checklist

CONDUCTING A MARKET SURVEY

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In conducting a market survey, the student:

	Accomplished	Not Accomplished
1. Surveyed ten people connected with the school............	☐	☐

Task Assignment Sheet PA-MD-3

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: MAKING DECISIONS BASED ON MARKETING RESEARCH

INTRODUCTION

You will remember that the goal of marketing research is to help you make valid decisions about specific problems. In this task assignment sheet you will learn how to make decisions based on the data provided in your completed questionnaires.

OBJECTIVE(S)

GIVEN the results of the marketing survey completed in Task Assignment Sheet PA-MD-2 and copies of the problems stated in the questionnaire,

MAKE A DECISION ON EACH PROBLEM. IDENTIFY THE DATA USED AS A BASIS FOR EACH DECISION.

YOUR DECISIONS should be valid as indicated by the data used.

LEARNING ACTIVITIES

1. PARTICIPATE in a small group to TALLY the answers to one item on the questionnaire you used in PA-MD-2. Your teacher will provide the questionnaires. REPORT the results of the tally in class.
2. REVIEW the three problems stated on your questionnaire. DISCUSS which items of data can help you make a decision concerning each problem.
3. ARRANGE with your teacher to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your teacher will provide a copy of the three problems stated in the questionnaire.

Make a decision on each problem. Identify the data you used as a basis for your decision.

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Instructor's Final Checklist

MAKING DECISIONS BASED ON MARKETING RESEARCH

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In making decisions concerning the three problems stated in the questionnaire, the student:

	Accomplished	Not Accomplished
1. Made a valid decision, as indicated by the data, for each problem....................................	☐	☐
2. Identified the data used as a basis for each decision..	☐	☐

Task Assignment Sheet PA-MD-4
Manager

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PLANNING STORE LAYOUT

INTRODUCTION

Planning store layout is very important to the success of a store. An orderly arrangement of merchandise saves employees time and permits customers to study the merchandise. In this task assignment sheet, you will learn how to plan a store layout.

OBJECTIVE(S)

DRAW A PLAN FOR YOUR SCHOOL STORE LAYOUT.

YOUR PLAN WILL BE RATED according to the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, PLANNING A SCHOOL STORE LAYOUT.
2. As a class, DECIDE where your store will be located and the kinds of equipment that will be needed.
3. DRAW a rough sketch of a layout that is suitable for your store. Your instructor will check your work and suggest any changes.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Make a neat drawing of the plan you completed in Learning Activity 3.

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Instruction Sheet I

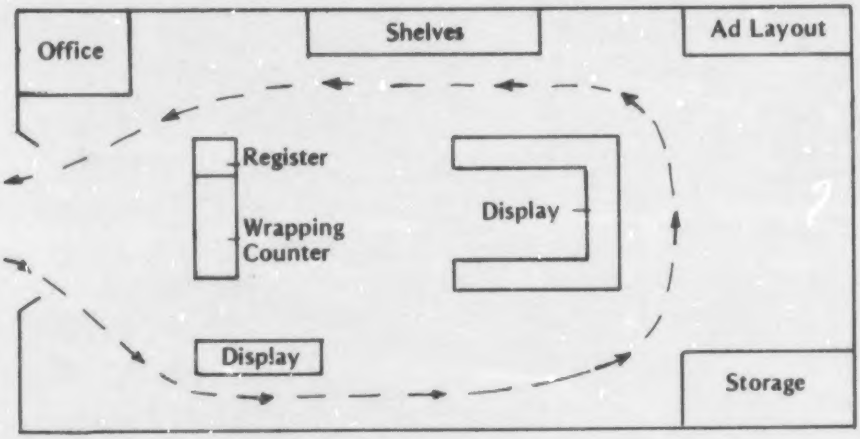
PLANNING A SCHOOL STORE LAYOUT

You may think of a store layout as a map of various parts of the store. Each part should be arranged so that both the employees and the customers benefit.

There are several things you must keep in mind when planning a school store layout:

1. Plan for storage of merchandise.
2. Plan for display of merchandise. (Keep items that are easy to steal under lock and key.)
3. Provide a check-out counter where the cash register or cash drawer is located.
4. Provide a wrapping counter.
5. Plan for office space.
6. Provide space for ad layout.
7. Plan the arrangment so that traffic can move in a circular path.

Study the sketch of a school store layout below.


Office
Shelves
Ad Layout
Register
Wrapping Counter
Display
Display
Storage

Instructor's Final Checklist

PLANNING STORE LAYOUT

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's store layout plan included:

	Accomplished	Not Accomplished
1. Storage space..	☐	☐
2. Display counters and/or shelves......................	☐	☐
3. A check-out counter..................................	☐	☐
4. A wrapping counter...................................	☐	☐
5. Office space...	☐	☐
6. Ad layout space......................................	☐	☐
7. An arrangement that permitted traffic to move in a circular path....................................	☐	☐

Task Assignment Sheet PA-MD-5
All Store Employees

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: OBSERVING STORE SAFETY

INTRODUCTION

Every year, many workers have accidents that are serious enough to need a doctor's attention. Working safely is as much a part of store employees' jobs as doing their work. In this task assignment sheet, you will learn a few basic safety suggestions.

OBJECTIVE(S)

GIVEN a picture of a store aisle,

LIST THE UNSAFE CONDITIONS WHICH APPEAR IN THE PICTURE.

AT LEAST SIX of the eight unsafe conditions should be listed.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, AVOIDING STATES OF MIND THAT CONTRIBUTE TO ACCIDENTS.
2. PARTICIPATE in a skit which illustrates one of the states of mind discussed in Instruction Sheet I. WORK with a small group of classmates in planning and presenting the skit.
3. READ Instruction Sheet II, TAKING SAFETY PRECAUTIONS.
4. DISCUSS dangerous conditions that can exist in a store.
5. WATCH your instructor demonstrate lifting a heavy object, using a step ladder, and cutting open a package.
6. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a picture of a store aisle.

List the unsafe conditions which appear in the picture.

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Instruction Sheet I

AVOIDING STATES OF MIND THAT CONTRIBUTE TO ACCIDENTS

Most accidents are caused by someone's state of mind setting the stage for injury. There are nine good reasons why many people have accidents:

DISOBEDIENT. Some people resent anyone suggesting or telling them what to do. As a result, they deliberately ignore safety precautions. Some people even like to pretend that disobedience and danger "are the spice of life."

FORGETFUL. "I meant to, but I forgot," can be the cause of a serious accident.

INEXPERIENCED. A few people are ashamed to admit that they "don't know," and rather than asking for help, they are willing to take big risks. They just guess and muddle through.

CARELESS. "Stay alert and stay alive." Many accidents occur because someone was daydreaming, became careless, and caused an unfortunate accident. On the other hand, some people take the attitude, "Oh, why bother? Nothing bad has happened."

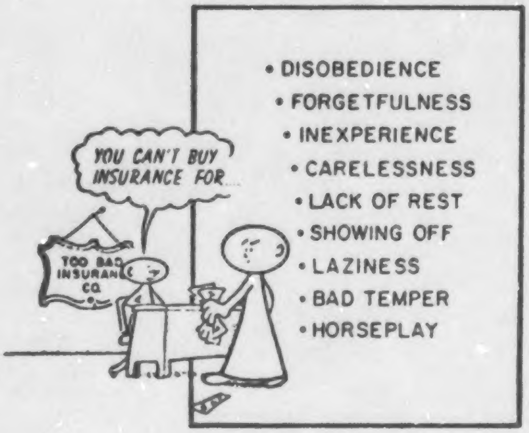
LAZY. A person who takes the attitude that taking safety precautions is "just too much trouble" is asking for trouble.

TIRED. Fatigue is a frequent cause of accidents. The more wide awake a person is, the less likely he/she is to get hurt.

BAD TEMPERED. A person who takes the attitude, "I'll do it my way, or else!" can expect to have trouble in more ways than one with family, friends, co-workers AND with safety measures. Also, those who throw temper tantrums and kick or throw things can be a hazard to themselves and, even worse, to others.

A SHOW-OFF. Some people have such a sense of insecurity that they feel the need to show off and are silently pleading, "Watch me!" In a desperate attempt to gain attention from others, they are willing to take dangerous risks in order to prove their worth, thus risking their own safety and perhaps that of others.

A PRANKSTER. Practical jokes and horseplay may be appropriate for a party, but it can be dangerous in a store. Throwing things, tripping, playing practical jokes, and other horseplay can cause major mishaps.

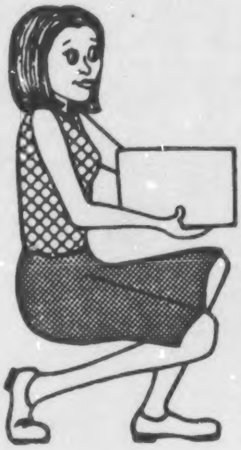


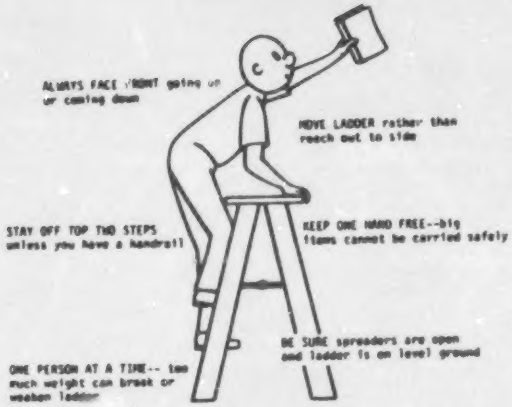
Instruction Sheet II

TAKING SAFETY PRECAUTIONS

Safety simply means protection from: being hit, being caught in or under, falling, striking against, making electrical contact, or being burned. Below are some simple safety rules a store employee should follow.

Lifting. Use the strong leg and arm muscles to lift. Keep your back straight, bend your knees, and pick up the load, holding it close to your body. Then use your leg, not your back, muscles to rise to a standing position.




ALWAYS FACE FRONT going up or coming down
MOVE LADDER rather than reach out to side
STAY OFF TOP TWO STEPS unless you have a handrail
KEEP ONE HAND FREE--big items cannot be carried safely
BE SURE spreaders are open and ladder is on level ground
ONE PERSON AT A TIME-- too much weight can break or weaken ladder

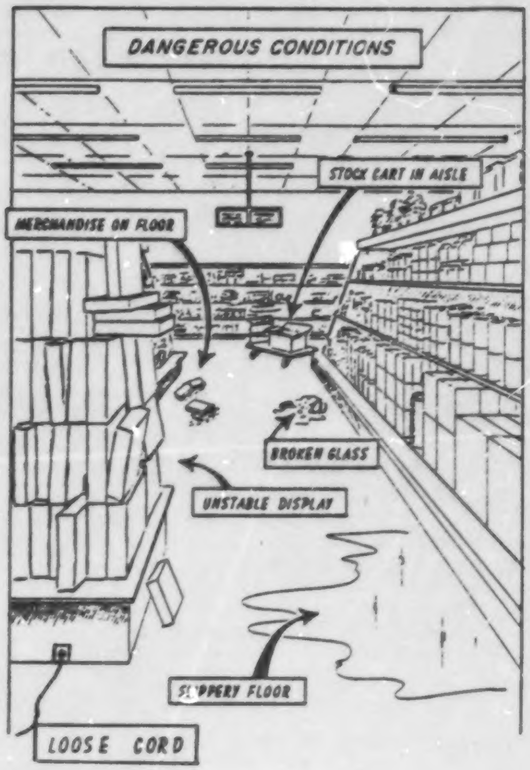
Climbing. When there is a need to climb to get something beyond your reach, use a ladder. (Avoid using chairs, tables, drawers, boxes, etc.) Even when using a ladder, you must be extremely careful. Study the illustration at the left.

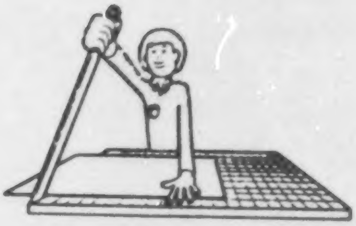
Instruction Sheet II (p. 2)

Being Neat and Clean. Keep floors clean and uncluttered at all times. A slick spot on the floor can be an ordeal for the person who slips on it. If you see a wet spot on the floor, wipe it up.

Also, help keep the floor uncluttered by picking up foreign objects and putting them in their places. Even something as small as a match can cause someone to trip and fall. Electrical cords should never be in the path of traffic.

Store displays must be stacked neatly and securely. A falling item can cause injury to someone standing nearby.

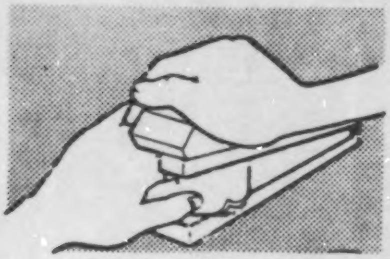

DANGEROUS CONDITIONS
STOCK CART IN AISLE
MERCHANDISE ON FLOOR
BROKEN GLASS
UNSTABLE DISPLAY
SLIPPERY FLOOR
LOOSE CORD



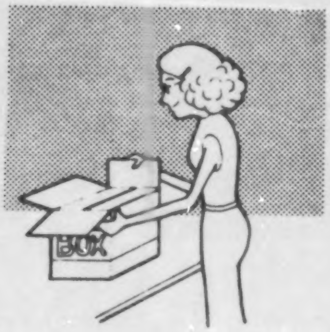
Handling Tools Safely. The proper use of tools is extremely important to store safety.

Be particularly alert when using a paper cutter. Make sure that your fingers are well out of the way of the blade. Don't try to cut too many sheets at one time. When you have finished using the paper cutter, lock the arm in place.

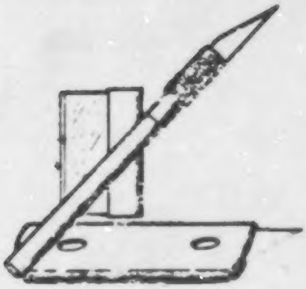
Instruction Sheet II (p. 3)



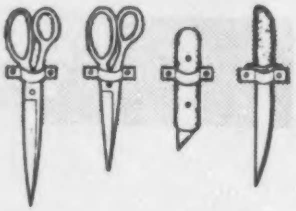
Never test a jammed stapler by holding your thumb over the place where the staple comes out. This is a common cause of punctures.



Open packages by using a sharp cutting tool and cutting away from you. Before you begin cutting, inspect for objects that may be projecting from the package.



Store sharp objects, such as razor blades, in covered containers, and dispose of them in a place where they will not hurt anyone.



Put away tools, such as shears and knives, as soon as you finish using them.

Instructor's Final Checklist

OBSERVING STORE SAFETY

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
After reviewing the picture of a store aisle, the student listed at least six of the eight unsafe conditions........	[ ]	[ ]

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: HANDLING IN-STORE ACCIDENTS

INTRODUCTION

Even though everyone is careful to follow safety rules, accidents do happen. For this reason, it is important that you know what to do in case a customer or employee is injured. In this task assignment sheet, you will learn how to handle in-store accidents.

OBJECTIVE(S)

GIVEN a written example of an in-store accident,

WRITE HOW A STORE EMPLOYEE SHOULD HANDLE THE PROBLEM.

YOUR WORK WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. PARTICIPATE in a telephone survey. CONTACT one store to find out how many and what kinds of accidents have occurred in the store during the past few months. As a class, LIST the most common kinds of accidents that have occurred.
2. READ and DISCUSS Instruction Sheet I, WHAT TO DO IN CASE OF AN ACCIDENT.
3. PREPARE a poster or bulletin board display which portrays an in-store accident.

   OR

   PREPARE a picture essay which shows what a store employee should do in case of an accident.

   OR

   CREATE and PRESENT a skit about an in-store accident.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

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CHECK-OUT ACTIVITIES

Your instructor will provide a written example of an in-store accident.

Write how a store employee should handle the situation.

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Instruction Sheet I

WHAT TO DO IN CASE OF AN ACCIDENT

Stores have their own policies concerning in-store accidents. So you should know all your store's rules about what to do to help. You should also:

1. In the event of an emergency--KEEP COOL. DO NOT PANIC!

2. Report immediately to your store manager any accident that happens to a customer, a co-worker, or you.

3. If a person is hurt, tell him/her that you have informed the store manager.

4. In case help must be called, do everything you can safely do to make the victim comfortable. However, do no try to move a victim who has fallen or who is seriously injured. NEVER administer any kind of medicine.

5. Help the store manager if you are asked to do so.

6. In case a customer is obviously injured but requests that you ignore it:

    a. Ask the customer to please wait until the store manager can talk with him/her.
    b. If the customer refuses to wait, do not force him/her to stay.

Instructor's Final Checklist

HANDLING IN-STORE ACCIDENTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In writing how the store employee should handle the in-store accident, the student listed the following:

	Accomplished	Not Accomplished
1. Do not panic	☐	☐
2. Report the accident immediately to the store manager	☐	☐
3. Tell the customer that the store manager has been informed	☐	☐
4. Do everything that can be done safely to make the customer comfortable until help arrives	☐	☐
5. Help the store manager when asked to do so	☐	☐

Task Assignment Sheet PA-MD-7
All Store Employees

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: OBSERVING FOR SHOPLIFTERS

INTRODUCTION

Shoplifting is a big problem for most stores. It is possible that you may need to help with store security. You must be able to detect shoplifters and to know what to do if you see one. In this task assignment sheet, you will learn how to detect shoplifting.

OBJECTIVE(S)

GIVEN descriptions of twelve customers,

IDENTIFY THE CUSTOMERS WHO ARE MOST LIKELY TO BE SHOPLIFTERS.

SIX customers should be identified.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, SHOPLIFTING--A SERIOUS PROBLEM.
2. VIEW a film about shoplifting.

   ____

3. SERVE on a committee to investigate how much money stores in your community lost to shoplifting last year. REPORT to the class.
4. READ about shoplifting and COMPLETE a skillbuilder about shoplifting. Your instructor will provide the exercises.
5. READ and DISCUSS Instruction Sheet II, DETECTING POSSIBLE SHOPLIFTERS.
6. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide descriptions of twelve customers.

Check the customers who are most likely to be shoplifters.

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Instruction Sheet I

SHOPLIFTING--A SERIOUS PROBLEM

Approximately $16,000,000,000 per year is lost due to shoplifting. This is compared to $47,500,000 lost to bank robberies during the same year. In this Instruction Sheet, we will talk about two groups of shoplifters--teenagers and employees.

Shoplifting by Teenagers

Teenagers are more guilty of shoplifting than any other group. In more than 50 percent of the shoplifters caught, the violators are from 13 to 19 years old. Girls outnumber the boys 4 to 1.

The average item stolen is valued at about $28, because so many expensive items are taken.

Shoplifting by Employees

One of the first rules of business ethics is to be honest and trustworthy. Unfortunately, some store employees do not practice this rule. Because they are often in a position to take merchandise without being detected, some employees steal thousands of dollars worth of goods each year from their employers. Many of these shoplifters are caught, however, and are prosecuted in the courts.

Because of the widespread practice of shoplifting, prices today are 5 to 7 percent higher than they normally would be.

Instruction Sheet II

DETECTING POSSIBLE SHOPLIFTERS

Every year merchants report that they lose millions of dollars in merchandise to shoplifters.

For this reason, it is especially important that you, as a store employee, stay alert for shoplifters. They cost everybody more money, because store owners must raise their prices in order to cover their losses.

SITUATIONS TO OBSERVE

In observing for shoplifters, be on guard for these situations:

1. Remember that shoplifting is more likely to occur during rush periods.

2. Observe customers carrying unwrapped packages. Offer to wrap or bag the merchandise. This will not offend an honest customer.

3. Be alert to people who:

   --Wear loose coats, capes, or bulky dresses.
   --Carry large purses, packages, umbrellas, and shopping bags.
   --Push baby strollers and collapsible carts.

4. Be especially alert for "teams"--thieves who pretend not to know each other. They often operate in this manner: One will attract the salesperson's attention away from a partner by causing a commotion, asking unreasonable questions, creating an argument, or even staging a fainting spell. While this is happening, the partner picks up merchandise and escapes.

*Adapted by permission from Model School Store Management Guide, North Dakota State Board for Vocational Education.

Instructor's Final Checklist

OBSERVING FOR SHOPLIFTERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
After reviewing descriptions of twelve customers, the student identified the six who are most likely to be shoplifters..	[ ]	[ ]

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PREVENTING SHOPLIFTING

INTRODUCTION

Shoplifters can be discouraged. There are a number of things that store employees can do to help prevent the theft of valuable merchandise. In this task assignment sheet you will learn some precautions to take in order to help prevent shoplifting.

OBJECTIVE(S)

GIVEN eight cases and a list of shoplifting prevention rules,

MATCH EACH CASE WITH THE RULE THAT WOULD HELP PREVENT THE ACTION DESCRIBED.

AT LEAST SIX of the cases must be matched correctly with the rules.

LEARNING ACTIVITIES

1. PARTICIPATE in a skit about shoplifting. Your instructor will provide more information about this activity.
2. READ and DISCUSS Instruction Sheet I, HOW A SALESPERSON CAN HELP PREVENT SHOPLIFTING.
3. PLAY the game, "What Would You Do If. . .?" Your instructor will explain how to play.
4. READ and DISCUSS Instruction Sheet II, HOW A CASHIER-CHECKER CAN HELP PREVENT THEFT.
5. WATCH your instructor demonstrate how to handle the cash register or cash box in order to prevent theft.
6. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide eight cases and a list of shoplifting prevention rules.

Match each case with the rule that would help prevent the action described.

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Instruction Sheet I

HOW A SALESPERSON CAN HELP PREVENT SHOPLIFTING

If you are a salesperson, you can help keep customers honest by helping prevent shoplifting. Shoplifters cannot steal if you don't give them a chance.

SHOPLIFTING PREVENTION RULES

To help prevent shoplifting, you should follow these basic rules:

1. Watch for shoplifters and let them know you are watching.

2. Keep in mind that ordinary customers want attention while shoplifters do not. Greet every customer who enters the store. Courtesy and attention are good for business, but bad for the shoplifter.

3. When you are busy with a customer, acknowledge other customers with a polite remark such as, "I'll be with you in a minute." Such attention can make a shoplifter uneasy.

4. If possible, never turn your back on customers, even when seeking merchandise for them. Do not give the impression that you distrust them, but always be alert to their movements. Pay particular attention to jittery eyes and nervous hands.

5. Know your stock. Keep it in good condition. By paying attention to new stock and to the neat appearance of your displays, you can more readily detect missing stock. Messy counters and shelves attract shoplifters. They assume that salespeople will not be able to miss the item in time to catch them before they leave the store.

6. Never leave display cases unlocked that should be locked.

7. Avoid placing more than one valuable item on the counter at a time when showing it to a customer.

8. Don't let customers carry more than one or two articles of clothing into a dressing room at a time.

9. Always remove empty hangers from clothing racks after articles have been purchased. An empty hanger becomes a signal that a shoplifter is at work.

Instruction Sheet II

HOW A CASHIER-CHECKER CAN HELP PREVENT THEFT

If you are a cashier-checker, you can help prevent theft by taking some specific precautions.

THEFT PREVENTION RULES

To help prevent theft, you should follow these basic rules:

1. Keep the space around the check-out area clean. Remove any large boxes. A shoplifter may hide behind them while picking up goods.

2, Always close the cash register drawer after each customer's purchase.

3. Lock your cash register if you have to leave it.

4. Do not turn away from the cash register when the cash drawer is open. A shoplifter may reach in the drawer when you are not looking.

5. Always give a receipt for a purchase. If store rules require that you attach a customer's receipt to a large bag or box, do so without fail. This prevents shoplifters from obtaining refunds on stolen items.

Instructor's Final Checklist

PREVENTING SHOPLIFTING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
In matching cases with the shoplifting prevention rules that would help prevent the actions described, the student matched at least six of the cases correctly.......	[ ]	[ ]

Task Assignment Sheet PA-MD-9
Salesperson, Manager

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: DEALING WITH SHOPLIFTERS

INTRODUCTION

Accusing customers of shoplifting is a very serious action. The store employee must be reasonably sure that shoplifting has taken place before confronting the suspect. Then specific procedures should be followed in handling the unpleasant situation. In this task assignment sheet, you will learn how to deal with shoplifters.

OBJECTIVE(S)

1. GIVEN a written example of a shoplifting situation,

   LIST THE STEPS THAT A SALESPERSON SHOULD TAKE IN THE SITUATION.

   THREE STEPS should be listed in accordance with the instructor's Final Checklist.

2. GIVEN a written example of a shoplifting situation,

   LIST THE STEPS THAT A STORE MANAGER SHOULD TAKE IN THE SITUATION.

   FOUR STEPS should be listed in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. LISTEN to a manager of a local store explain how to deal with customers who are suspected of shoplifting. WRITE a report on the talk.

   OR

   SERVE on a committee to investigate how your Police Department deals with shoplifters. PREPARE a report for the class.

2. READ and DISCUSS Instruction Sheet I, SALESPERSONS DEALING WITH SHOPLIFTERS.

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3. READ and DISCUSS Instruction Sheet II, STORE MANAGERS DEALING WITH SHOPLIFTERS.

4. PARTICIPATE in a skit about a juvenile court case. Your instructor will provide more information about this activity.

5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

1. Your instructor will provide a written example of a shoplifting situation.

   List the steps that a salesperson should take in the situation.

2. Your instructor will provide a written example of a shoplifting situation.

   List the steps that a store manager should take in the situation.

Instruction Sheet I

SALESPERSONS DEALING WITH SHOPLIFTERS

As a salesperson, you must always be on the alert for actual shoplifting customers.

DETECTING SHOPLIFTING

Shoplifting usually is detected by these three ways:

1. An item is switched to another box or package which has a cheaper price tag.
2. An item is concealed in the person's pocket, purse, package, etc.
3. An item is missing, and the individual who has been looking at it has disappeared.

When you observe one of these situations, you should deal with it very carefully. It is possible that you or your supervisor could be charged with false arrest. Or an innocent customer could be accused injustly and sue for defamation of character (injuring a person's reputation by false statements).

REPORTING SHOPLIFTING

If you think someone in the store is shoplifting, take these steps:

1. Watch the person carefully. If you can, have another store employee watch with you.
2. Notify your store manager or store security immediately. (You should know how your store expects you to report shoplifting. There may be a special code or signal to use.) If it is necessary for you to leave your work area and you are unable to leave, have another employee do it.
3. If possible, keep the shoplifter in sight until help arrives.

Instruction Sheet II

STORE MANAGERS DEALING WITH SHOPLIFTERS

It is possible that after you "learn the ropes" as a salesperson, you will move up the job ladder to store manager. You will then deal directly with customers who are being accused of shoplifting.

DEALING WITH SHOPLIFTERS

As the store manager, when you are sure there are reasonable grounds for suspicion (as listed in Instruction Sheet I), take these steps:

1. Approach the person and request identification. You may ask the person's name and/or request him/her to show you some identification. (It is a good idea to have another store employee accompany you as a witness.)

2. Ask the person to accompany you to a private location, such as the store office. (This step will help avoid a commotion in the store or embarrassment to both you and the customer.)

3. Ask the person if he/she has the merchandise.

   a. If the answer is "yes," request that the merchandise be returned.
   b. If the answer is "no," do not try to search the person or force him/her to return the merchandise.

4. Notify the police. (If the person tries to leave before the officer arrives, you have the legal right to try to stop him/her. You may use tactics such as stepping in front of him/her or locking the door. However, you do not have the right to cause any physical harm.)

Instructor's Final Checklist

DEALING WITH SHOPLIFTERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
1. The student listed the following steps that a salesperson should take in dealing with the shoplifting situation:		
a. Watch the person carefully. Have another store employee watch, when possible.............	☐	☐
b. Notify the store manager or store security immediately.......................................	☐	☐
c. Keep the shoplifter in sight until help arrives..	☐	☐
2. The student listed the following steps that a store manager should take in dealing with the shoplifting situation:		
a. Approach the person and request identification..	☐	☐
b. Ask the person to accompany you to a private location...	☐	☐
c. Ask the person if he/she has the merchandise. If the answer is "yes," request that the merchandise be returned.........................	☐	☐
d. Notify the police..............................	☐	☐

Task Assignment Sheet PA-MD-10
All Store Employees

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: HANDLING CUSTOMER COMPLAINTS

INTRODUCTION

People like to shop where employees are cheerful and polite. When a customer has a complaint, you can keep the customer's good will by being helpful and friendly. In this task assignment sheet you will learn how to handle customer complaints.

OBJECTIVE(S)

GIVEN five customer complaints with two store employee responses for each complaint,

CHOOSE THE CORRECT RESPONSE FOR EACH COMPLAINT.

The correct response must be chosen for at least four of the complaints.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, HANDLING CUSTOMER COMPLAINTS.
2. WATCH your instructor demonstrate how to handle a customer complaint.
3. PLAY THE ROLE of a store employee while a classmate acts the part of a customer with a complaint. HANDLE the complaint. ASK some other students to watch and see if they agree with what you say.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide customer complaints with store employee responses for each complaint.

Choose the correct response for each complaint.

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Instruction Sheet I

HANDLING CUSTOMER COMPLAINTS

Many times customers will come to you with complaints. If you can help them with their problems, you will also help your store.

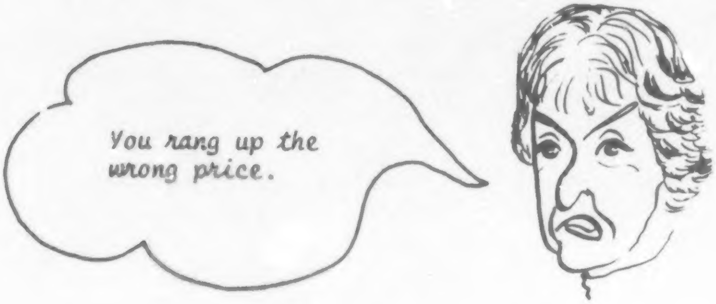
GUIDELINES FOR HANDLING COMPLAINTS

Things to remember in handling complaints are:

1. Listen politely to everything a customer has to say before replying. Do not be nasty to the customer. Many complaints made by customers are honest. Even when they are not, you should treat the customer politely.
2. Agree that the customer has a right to complain. However, do not talk badly about your employer. This would not be very business-like. by showing a real interest in the customer's complaint, you let the customer know that he/she is important.
3. Do not get angry or argue with the customer.
4. Handle the complaint as soon as possible in order to make the customer happy. If you cannot correct the problem, send the customer to someone who can.

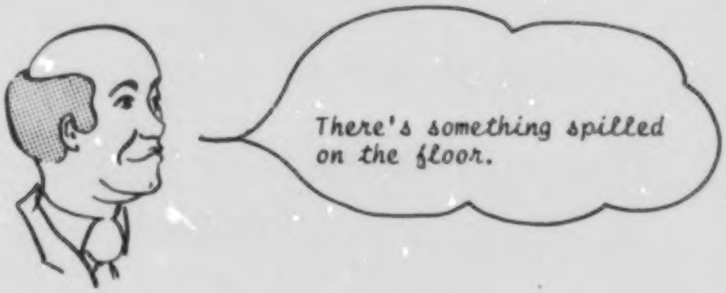
EXAMPLES OF COMPLAINTS

Here are some examples of complaints you may come across while working in a store. There are also suggested answers you could give to your customers.

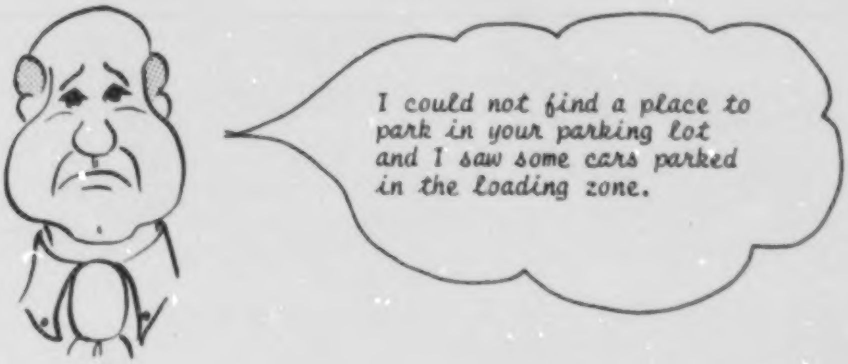

You rang up the wrong price.

Instruction Sheet I (p. 2)

If you did ring up the wrong price, tell the customer you are sorry and explain how you will correct it. If you did not ring up the wrong price, politely explain to the customer that the price is correct and point out the price on the product.


There's something spilled on the floor.

Thank the customer for telling you. As soon as possible, see that the floor is cleaned.


I could not find a place to park in your parking lot and I saw some cars parked in the loading zone.

Tell the customer you are sorry about the problem. As soon as possible, tell the manager about the situation.

Instructor's Final Checklist

HANDLING CUSTOMER COMPLAINTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
In choosing the correct store employee response for each customer complaint, the student chose the correct response for at least four of the five complaints......................	[ ]	[ ]

Task Assignment Sheet PA-MD-11
Manager

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PLACING TELEPHONE ORDERS

INTRODUCTION

Ordering new merchandise is an important task in operating a store. Many store managers place orders by telephone. In this task assignment sheet, you will learn to place orders by telephone.

OBJECTIVE(S)

GIVEN a written order for merchandise and a telephone training instrument,

PLACE THE ORDER BY TELEPHONE.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, TELEPHONING AN ORDER.
2. WATCH your instructor demonstrate placing a telephone order.
3. PRACTICE placing a telephone order by going through Student Self-Check I, TELEPHONING AN ORDER.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide an order for merchandise and a telephone training instrument.

Place the order by telephone.

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Instruction Sheet I

TELEPHONING AN ORDER

The following guidelines will help you learn how to place telephone orders.

1. Read the order that you are going to call before placing your call. Check it to determine whether you understand the name, description, and quantity of each item to be ordered.

2. Place the call.

3. Identify yourself by:

   a. Telling the order clerk the name of your store.
   b. Telling the order clerk your name so that if any questions arise concerning the order, you can be reached.

4. Place your order with the order clerk being sure to state:

   a. The name or description of each item.
   b. The size of each item (if applicable).
   c. The quantity (number) needed.

5. If the order clerk does not reread your order, ask that this be done so that you can prove your order.

6. Write a notation beside any item that is not available.

7. Write a notation on the order if substitutions are to be made.

8. Tell the order clerk whether the order is to be picked up or delivered.

9. End your call with a polite statement, such as "Thank you."

10. After completing your call, write on the order form the date the order was made and the name of the business called.

Student Self-Check I

TELEPHONING AN ORDER

Ask a classmate to play the role of an order clerk as you pretend to telephone the order below. (As you make the call, have the classmate check your performance by using the checklist on the next page.)

Order For Merchandise

1 dozen notebooks, 3-ring, blue
1 dozen notebooks, theme
2 boxes pencils, No. 2½, yellow
2 boxes ballpoint pens, blue ink
1 dozen pads notebook paper, 100 sheets per pad

The order is to be delivered.

Student Self-Check I (p. 2)

CHECKLIST

	YES	NO	
1.	______	______	Read the order before placing the call.
2.	______	______	Indicated your name and the name of your store.
3.	______	______	Indicated the name, description, and quantity of each item ordered.
4.	______	______	Proved the order.
5.	______	______	Indicated whether the order is to be picked up or delivered.
6.	______	______	Closed the call politely.

Instructor's Final Checklist

PLACING TELEPHONE ORDERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In the process of telephoning an order, the student:

	Accomplished	Not Accomplished
1. Identified self and name of store....................	☐	☐
2. Placed the order by telling the order clerk:		
a. Name of items....................................	☐	☐
b. Description of items.............................	☐	☐
c. Quantity wanted..................................	☐	☐
3. Asked order clerk to prove the complete order by reading it back..................................	☐	☐
4. Noted any substitutions on order....................	☐	☐
5. Indicated on order form the date order was placed....	☐	☐
6. Indicated on order form the name of the business called..	☐	☐

Task Assignment Sheet PA-MD-12
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: ORDERING MERCHANDISE BY REQUISITION

INTRODUCTION

There are several ways merchandise can be ordered. One of the ways is to list the goods needed on a form called a purchase requisition. This form serves as a request and is sent to the Purchasing Department. The clerk in that Department lists the goods on a purchase order and sends the order to the proper company. He/she then adds the purchase order number and the name of the company to the requisition. In this task assignment sheet, you will learn how to fill out a purchase requisition.

OBJECTIVE(S)

GIVEN a purchase requisition form and an inventory list,

FILL OUT THE PURCHASE REQUISITION.

YOU SHOULD fill out the proper spaces on the requisition and enter the list of goods correctly.

LEARNING ACTIVITIES

1. STUDY and DISCUSS the purchase requisition in Instruction Sheet I, FILLING OUT A PURCHASE REQUISITION.
2. PRACTICE filling out a purchase requisition. Your teacher will tell you more about this activity.
3. ARRANGE with your teacher to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a purchase requisition form and an inventory list.

Fill out the purchase requisition.

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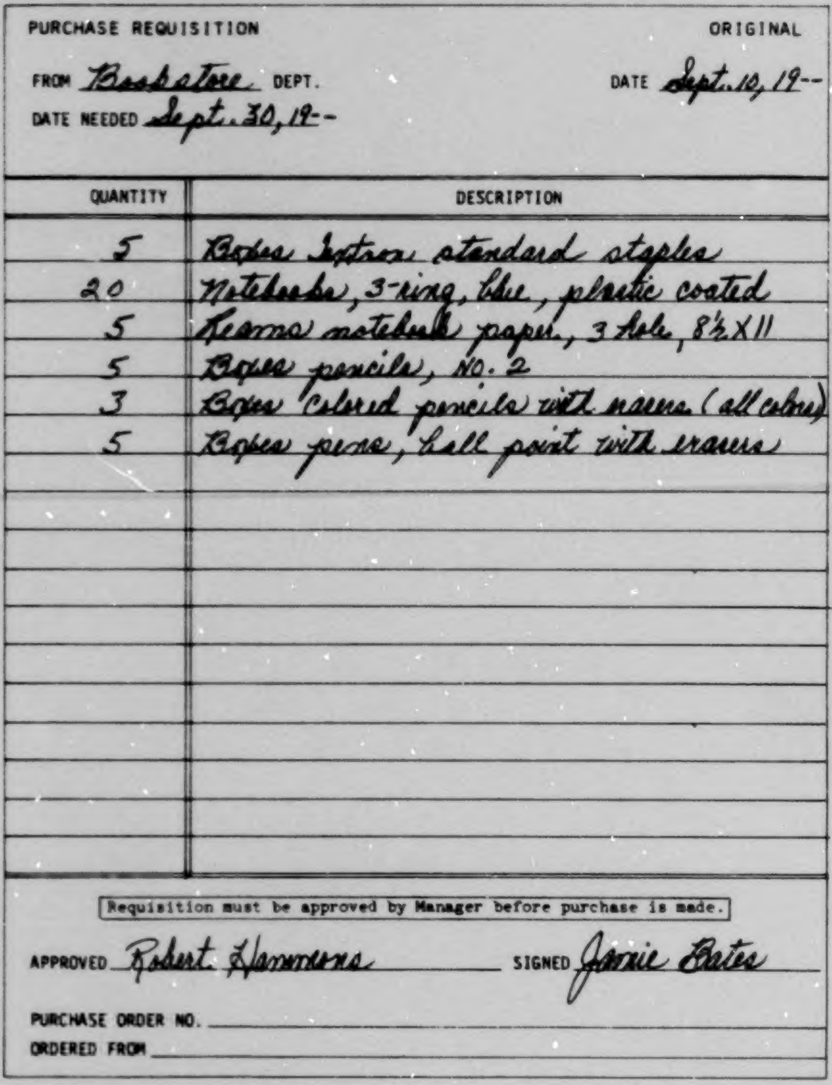
Instruction Sheet I

FILLING OUT A PURCHASE REQUISITION



PURCHASE REQUISITION ORIGINAL

FROM Bookstore DEPT. DATE Sept. 10, 19--

DATE NEEDED Sept. 30, 19--

QUANTITY	DESCRIPTION
5	Boxes Ixtron standard staples
20	Notebooks, 3-ring, blue, plastic coated
5	Reams notebook paper, 3 hole, 8½ X 11
5	Boxes pencils, No. 2
3	Boxes colored pencils with erasers (all colors)
5	Boxes pens, ball point with erasers

Requisition must be approved by Manager before purchase is made.

APPROVED Robert Hammons SIGNED Jamie Bates

PURCHASE ORDER NO. ________

ORDERED FROM ________

Instructor's Final Checklist

ORDERING MERCHANDISE BY REQUISITIONS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In filling out a purchase requisition, the student:

	Accomplished	Not Accomplished
1. Filled out the proper spaces on the requisition...........	[ ]	[ ]
2. Entered the list of goods without error...................	[ ]	[ ]

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: IDENTIFYING WAREHOUSE EQUIPMENT

INTRODUCTION

After the merchandise has been shipped from the factory and delivered to the warehouse, it must be moved to the proper place in the warehouse. Various types of warehouse equipment are used to move the merchandise. In this task assignment sheet you will learn about some basic types of warehouse equipment used to move merchandise.

OBJECTIVE(S)

GIVEN pictures of five pieces of warehouse equipment,

GIVE THE NAME OF EACH PIECE OF EQUIPMENT, AND TELL HOW IT IS USED IN THE WAREHOUSE.

YOU SHOULD give the correct name and use of each piece of equipment.

LEARNING ACTIVITIES

1. READ, STUDY THE PICTURES, and DISCUSS Instruction Sheet I, RECOGNIZING BASIC WAREHOUSE EQUIPMENT.
2. IDENTIFY the kinds of warehouse equipment used in your school.
3. WATCH a demonstration of the operation of a piece of warehouse equipment.
4. ARRANGE with your teacher to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your teacher will provide pictures of warehouse equipment.

Give the name of each piece of equipment, and tell how it is used in the warehouse.

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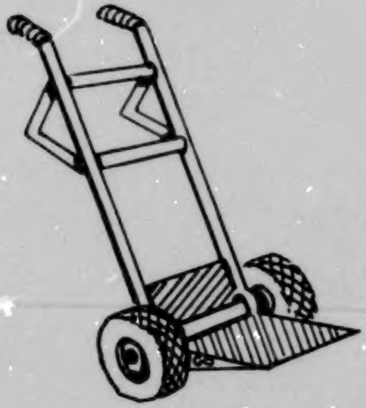
Instruction Sheet I

RECOGNIZING BASIC WAREHOUSE EQUIPMENT

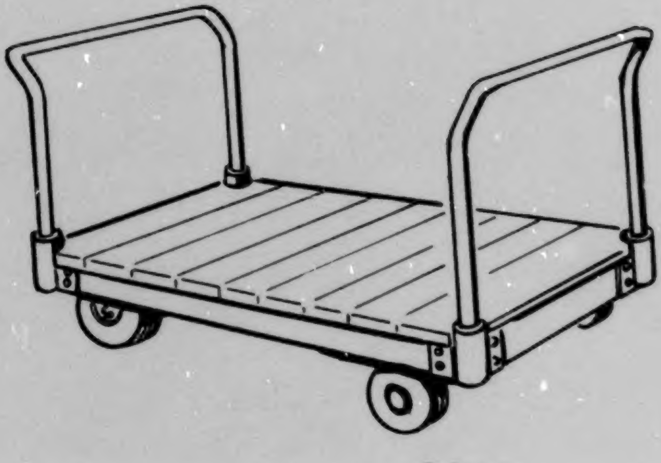
Warehouse equipment often falls into groups. Below are descriptions of three basic groups of equipment.

DOLLIES are loaded by hand and pushed to the area where the merchandise is to be stored in the warehouse.

This is a two-wheel dolly.

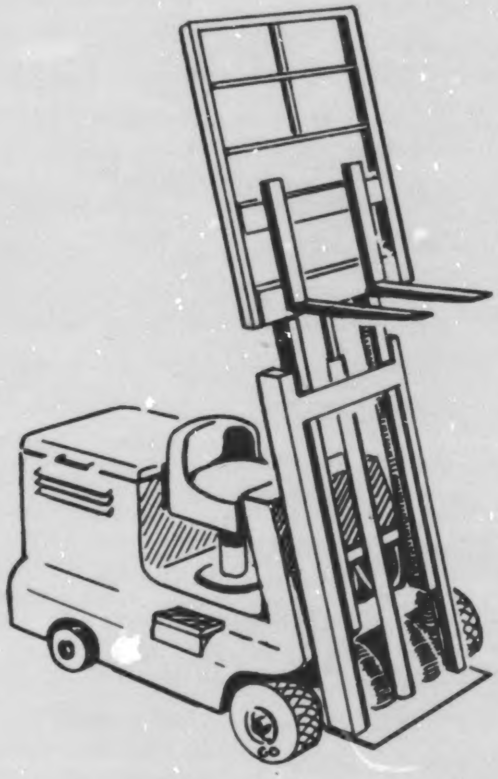


This is a four-wheel dolly.



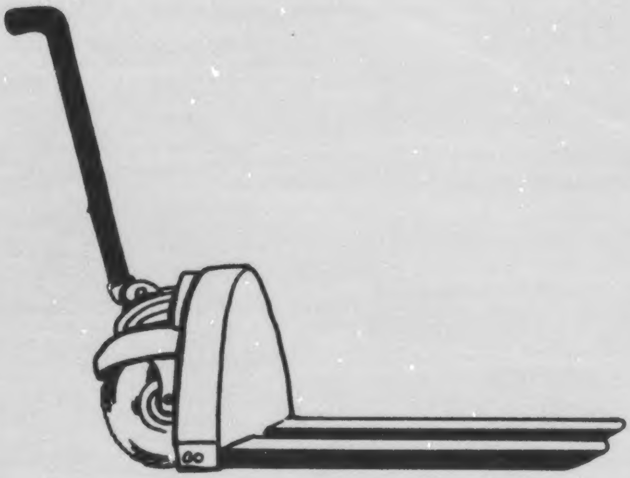
Instruction Sheet I, (p. 2)

FORKLIFTS pick up pallets that are loaded with merchandise. (A pallet is a low, moveable platform on which materials are stacked.)



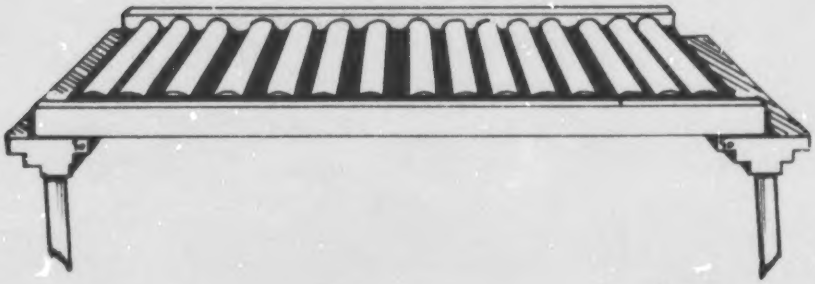
This is a mechanical forklift. A driver operates it to pick up pallets loaded with merchandise and transport them to the proper place in the warehouse.

This is a lift jack. It is a manual type of forklift. It is used in small areas in which a mechanical forklift cannot be used.

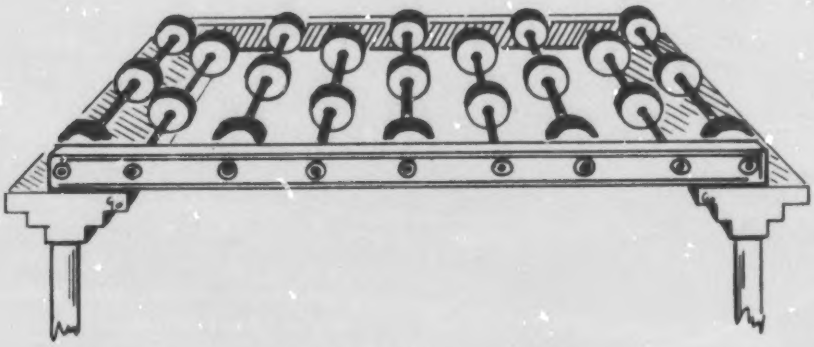


Instruction Sheet I, (p. 3)

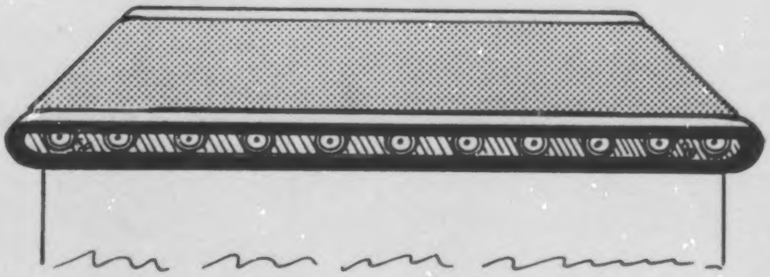
CONVEYORS transport merchandise on a one-line system to a specific area in the warehouse.



These are roller conveyers. They are placed at an angle similar to a ramp. The merchandise then rolls down them.



This is a belt conveyor. You often see these at check-out counters in stores. It carries the merchandise that is resting on the belt.



Instructor's Final Checklist

IDENTIFYING WAREHOUSE EQUIPMENT

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In identifying warehouse equipment, the student:

	Accomplished	Not Accomplished
1. Gave the correct name of each piece of equipment..........	[ ]	[ ]
2. Explained the correct use of each piece of equipment......	[ ]	[ ]

Task Assignment Sheet PA-MD-14
Receiving Clerk

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: CHECKING IN MERCHANDISE

INTRODUCTION

When a store receives a shipment of merchandise, the order must be checked carefully. The order must be the same as that shown on the invoice (a list of the goods showing the items ordered, quantities, and prices). Also, all items should be in good condition. Any damaged ones should be returned to the shipper. In this task assignment sheet, you will learn how to check in orders of merchandise.

OBJECTIVE(S)

GIVEN an order of merchandise and an invoice,

CHECK IN THE MERCHANDISE.

YOUR WORK will be rated in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. STUDY the invoice in Instruction Sheet I, READING AN INVOICE. As a class, DISCUSS each part of the invoice.
2. READ and DISCUSS Instruction Sheet II, CHECKING IN MERCHANDISE.
3. WATCH your instructor demonstrate how to check in merchandise.
4. PRACTICE checking in merchandise by completing Student Self-Check I, CHECKING IN MERCHANDISE.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide an order of merchandise and an invoice.

Check in the merchandise.

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Instruction Sheet I

READING AN INVOICE

An invoice is a complete description of an order of merchandise. Study each part of this invoice.

SCHOOL STORE SUPPLIES
102 Plaza Park
Boone, KY 40401

Date February 18, 19--

Invoice Number: 12345

Purchase Order Number: 2468

Sold To: City School
Harvest Lane
Camp, Kentucky 40400

Ship to: City School
Harvest Lane
Camp, Kentucky 40400

Quantity	Description		Unit Price	Total
3 doz.	Notebooks, 3-ring, black		.50	18.00
2 doz.	Notebooks, theme, spiral		.25	6.00
10 boxes	Pencils, No. 2, yellow		1.00	10.00
GRAND TOTAL				34.00

Received by: Carol Ward Date 2-21-19--

Instruction Sheet II

CHECKING IN MERCHANDISE

When checking in an order of merchandise, you should:

1. Check to see if each kind of merchandise received is the same as that described on the invoice. (For example, you should have received black, 3-ring notebooks as listed on the invoice in Instruction Sheet I.)

2. Count the number of each item listed and compare the count to the number that is on the invoice.

3. Make a check mark by each item that agrees with the description and quantity listed on the invoice.

4. Some items received may not agree with the description and quantity listed on the invoice. When this occurs, write a description of the difference on the invoice by each item found to be in error.

5. Check each piece of merchandise for damage. In the space under the items listed, write a note describing any damage.

6. Sign your name in the space by "Received by."

7. Write the date the merchandise is checked.

Student Self-Check I

CHECKING IN MERCHANDISE

Your instructor will provide a copy of this page. Do not write on this page. Check in the order of merchandise listed below. When you have finished check your invoice with the one on the next page.

MERCHANDISE RECEIVED

Item	Description	Quantity
Ball point pens	blue	2 boxes
Colored pencils		3 boxes
T-shirts	white	12
Sweat shirts	blue	5 (1 shirt has torn sleeve)

INVOICE

Quantity	Description	Unit Price	Total
2 boxes	Ball point pens, blue	1.00	2.00
5 boxes	Colored pencils	.50	2.50
10	T-shirts, white	2.00	20.00
5	Sweat shirts, gray	4.00	20.00
GRAND TOTAL			44.50

Received by: ______________________ Date ______________

Student Self-Check I (p. 2)

ANSWER

Quantity	Description	Unit Price	Total
2 boxes	Ball point pens, blue ✓	1.00	2.00
5 boxes	Colored pencils 2 short	.50	2.50
10	T-shirts, white 2 over	2.00	20.00
5	Sweat shirts, gray blue	4.00	20.00
	Sleeve torn on 1 sweat shirt		
GRAND TOTAL			44.50

Received by: your name Date: Today

Instructor's Final Checklist

CHECKING IN MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In checking in merchandise received, the student's invoice included:

	Accomplished	Not Accomplished
1. A check mark by each item that agreed in description and quantity with merchandise received..................	[ ]	[ ]
2. By any item found to be in error, a description of the error..	[ ]	[ ]
3. A description of any damaged merchandise.................	[ ]	[ ]
4. The student's signature..................................	[ ]	[ ]
5. The date the student checked in the merchandise..........	[ ]	[ ]

Task Assignment Sheet PA-MD-15
Stock Clerk

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: STORING MERCHANDISE

INTRODUCTION

When new merchandise is received, it is stored until it is wanted for sale. Store managers usually choose the places for storage, and the stock clerk stores the merchandise in the proper places. In this task assignment sheet you will learn how to store merchandise.

OBJECTIVE(S)

GIVEN a storage area, merchandise, and bin tickets,

STORE THE MERCHANDISE.

YOU WILL BE RATED according to the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, STORING MERCHANDISE.
2. WATCH your instructor demonstrate storing merchandise.
3. READ and DISCUSS Instruction Sheet II, FILLING OUT A BIN TICKET.
4. PRACTICE filling out a bin ticket. Your teacher will tell you more about this activity.
5. ARRANGE with your teacher to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your teacher will provide a supply of merchandise and a bin ticket.

Store the merchandise in the storage area.

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Instruction Sheet I

STORING MERCHANDISE

Here is a procedure for storing merchandise.

1. Find out where the merchandise is to be placed. Putting goods in the right place makes it easy to find them when they are needed.

2. Choose the best way to move the merchandise. If it is light, you may be able to carry it in your arms. If it is heavy or bulky, you may need a dolly or other equipment. Choosing the best way to move the merchandise helps prevent damage.

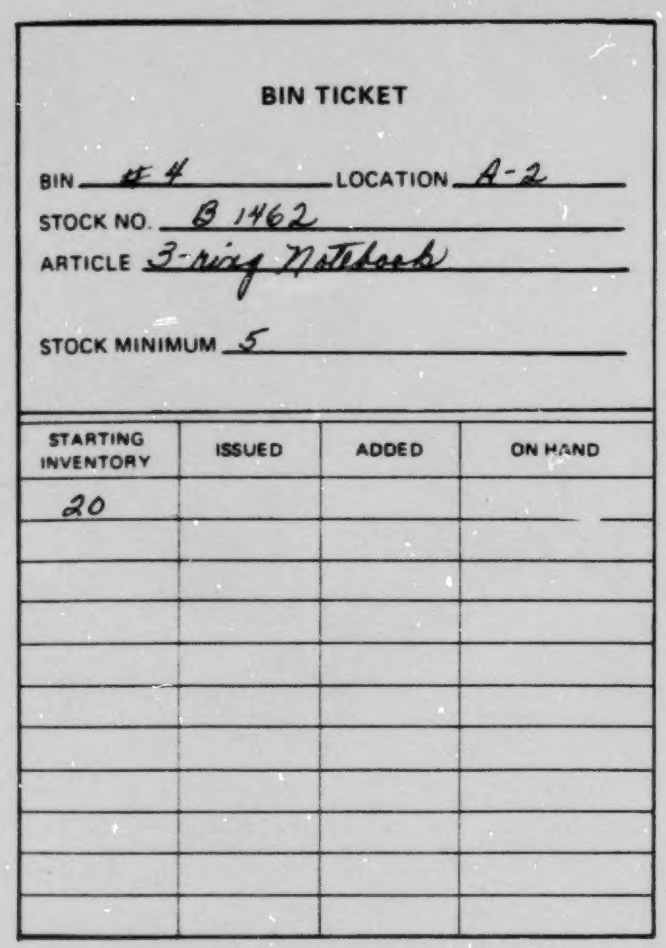
3. Store like goods together. Put items together by size, color, style, etc. This makes them easy to find when they are needed.

4. Rotate the merchandise. Remove old items from storage, and put the new merchandise on the back of the shelf. Place the old items in front of the new ones.

5. Fill out a bin ticket for each kind of merchandise, and attach it to the shelf where the merchandise is stored. The following Instruction Sheet tells you how to fill out a bin ticket.

Instruction Sheet II

FILLING OUT A BIN TICKET



BIN TICKET

BIN #4 LOCATION A-2

STOCK NO. B 1462

ARTICLE 3-ring Notebook

STOCK MINIMUM 5

STARTING INVENTORY	ISSUED	ADDED	ON HAND
20			

A bin ticket tells the store three things: (1) how much of each item the store should have, (2) how much of each item is on hand, and (3) when to buy more stock. It is attached to the storage shelf when the article is stored. When it is removed and placed on the shelves in the store, it is recorded on the ticket.

The illustration above shows how the stock clerk fills out the bin ticket when the merchandise is stored:

Bin is the specific section of the shelf or other storage place.

Location is the row and shelf number.

Instruction Sheet II (p. 2)

Stock No. is the number your store uses to identify the merchandise. It tells one model or style from another.

Article is a description of the merchandise.

Stock Minimum is the amount of an article that your store should have on hand at all times in order to have enough to sell.

Starting Inventory is the amount of the article that your store has at the beginning of a certain period of time.

Instructor's Final Checklist

STORING MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In storing merchandise, the student:

	Accomplished	Not Accomplished
1. Moved the merchandise in the best way................	☐	☐
2. Stored the merchandise in the correct section of the storage area..	☐	☐
3. Stored like goods together..........................	☐	☐
4. Rotated the merchandise (when necessary)............	☐	☐
5. Filled out a bin ticket correctly:		
a. Bin number.......................................	☐	☐
b. Location...	☐	☐
c. Stock number.....................................	☐	☐
d. Article..	☐	☐
e. Stock minimum....................................	☐	☐
f. Starting inventory...............................	☐	☐

Task Assignment Sheet PA-MD-16
Marker

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: CODING AND PRICE MARKING MERCHANDISE

INTRODUCTION

Price marking and coding provide valuable information for the customers and the store employees. Markers take particular care in coding and price marking merchandise. Errors can cause loss of money, loss of time, and inconvenience. In this task assignment sheet, you will learn how to code and price mark merchandise.

OBJECTIVE(S)

GIVEN merchandise, cost and selling price of the merchandise, a code word, and price-marking tools and supplies,

CODE AND PRICE MARK THE MERCHANDISE.

THE CODES should correspond to the cost of the merchandise. THE PRICES should correspond to the selling price of the merchandise. THE MARKING should be neat, legible, permanent, and cause no damage to the merchandise.

LEARNING ACTIVITIES

1. BRING to class an item that has been price marked. As a class, COMPARE the different kinds of devises used to show the prices on the various items. Also COMPARE the various markings used.
2. READ and DISCUSS Instruction Sheet I, CODING AND PRICE MARKING.
3. WATCH your instructor demonstrate how to code and price mark merchandise.
4. PRACTICE coding and price marking merchandise by completing Student Self-Check I, CODING AND PRICE MARKING.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide the following: items of merchandise, cost and selling price of the merchandise, a code word, and price-marking tools and supplies.

Price mark and code each item of merchandise.

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Instruction Sheet I

CODING AND PRICE MARKING

Have you noticed letters on the price tags of merchandise you have pruchased? These letters are codes which tell the store employees something they need to know.

One of the most common codes is the cost code which tells the store employee how much the store paid for the merchandise. Cost codes can be made several ways. A simple code is one which uses each letter in a ten-letter word to stand for a number--zero through nine. In this kind of code, the word must use a letter once. The following code word is a good example: WASHINGTOP

W - 0
A - 1
S - 2
H - 3
I - 4
N - 5
G - 6
T - 7
O - 8
P - 9

No decimal places or fractions are used in coding. The coded cost is usually printed above the selling price. For example, an item that costs \$1.50 and sells for \$2.25 is coded and price marked $\frac{\text{ANW}}{\$2.25}$. An item that cost 25¢ and sells for 35¢ is coded and price marked $\frac{\text{SN}}{35¢}$. An item that costs \$100.00 and sells for \$125.00 is coded and price marked $\frac{\text{AWWWW}}{\$125.00}$.

There are a variety of marking devices that can be used to code and price mark: grease pencils and ink stamps and pens to mark boxes, tickets, tags, gummed labels, and shelf tags.

Student Self-Check

CODING AND PRICE MARKING

Use the figures below to show how the price tag on merchandise should be coded and price marked. Use WASHINGTOP as your code word. USE YOUR OWN PAPER. Do not write on this page. When you have finished, check your answers with the ones at the bottom of the page.

Cost	Selling Price
67	.98
1.50	2.25
4.45	9.95
.86	1.19
50.00	75.00

ANSWERS: $\frac{\text{GT}}{98¢}$; $\frac{\text{ANW}}{2^{\underline{25}}}$; $\frac{\text{IIN}}{9^{\underline{95}}}$; $\frac{\text{OG}}{1^{\underline{19}}}$; $\frac{\text{NWWW}}{75^{\underline{00}}}$

Instructor's Final Checklist

CODING AND PRICE MARKING MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In coding and price marking merchandise, the student:

	Accomplished	Not Accomplished
1. Coded each item of merchandise to correspond to the cost of the item	☐	☐
2. Price marked each item of merchandise to correspond to the selling price of the item	☐	☐
3. Marked each price tag:		
a. Keatly	☐	☐
b. Legibly	☐	☐
c. With permanent marking	☐	☐
4. Caused no damage to the merchandise	☐	☐

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: STOCKING SHELVES AND TABLES

INTRODUCTION

When goods have been coded and price marked, they are displayed so customers can see, examine, and buy them. Most items are put on shelves, racks, or tables. This is called "stocking." In this task assignment sheet you will learn how to stock merchandise.

OBJECTIVE(S)

GIVEN coded and price-marked merchandise, shelves and/or tables,

STOCK THE SHELVES AND/OR TABLES WITH THE MERCHANDISE.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, STOCKING SHELVES AND TABLES.
2. WATCH your instructor demonstrate stocking a shelf or table.
3. PRACTICE stocking a shelf or table.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide coded and price-marked merchandise and shelves and/or tables.

Stock the shelves and/or tables with the merchandise.

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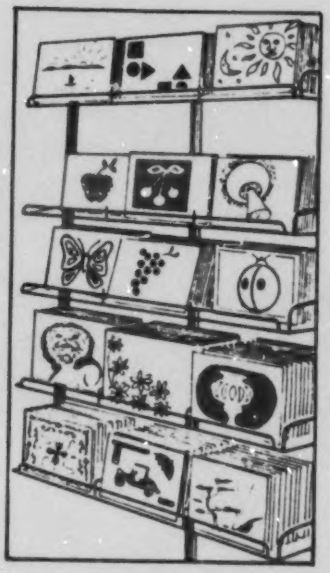
Instruction Sheet I

STOCKING SHELVES AND TABLES

To place merchandise on shelves and tables, follow these steps:



1. Remove any old merchandise.
2. Dust the shelves and tables.
3. Place the new merchandise at the back of the shelves and tables.
4. Dust off the older merchandise and place it at the front of the shelves and tables.
5. Place the same kinds of merchandise together.
6. Place the items so that customers can easily see the price.
7. Avoid overstocking. The merchandise might fall or be knocked off.
8. Display all items in a neat manner.

Instructor's Final Checklist

STOCKING SHELVES AND TABLES

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The newly stocked shelves and/or tables:	Accomplished	Not Accomplished
1. Were free of dust	[ ]	[ ]
2. Displayed new merchandise toward the back	[ ]	[ ]
3. Displayed older merchandise toward the front	[ ]	[ ]
4. Displayed the same kinds of merchandise together	[ ]	[ ]
5. Displayed prices so they could be easily seen	[ ]	[ ]
6. Were not overstocked	[ ]	[ ]
7. Displayed all items in a neat manner	[ ]	[ ]

Task Assignment Sheet PA-MD-18
Display Artist

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: MAKING SHOW CARDS

INTRODUCTION

Stores use a number of sales aids as a means of promoting their merchandise. The show card is one of the aids most frequently used. In this task assignment sheet you will learn how to plan and hand letter show cards.

OBJECTIVE(S)

GIVEN a felt tip pen, cardstock, and a list including store services,

MAKE ONE SHOW CARD.

YOUR SHOW CARD will be rated in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. LOOK AT the examples of show cards in Instruction Sheet I, SHOW CARDS. IDENTIFY the information given on each one.
2. STUDY the one-stroke Gothic-style letters and numerals in Instruction Sheet II, THE GOTHIC ALPHABET AND NUMERALS. PRACTICE making the basic strokes.
3. STUDY Instruction Sheet III, SPACING LETTERS AND NUMERALS. PRACTICE hand lettering words using the Gothic style.
4. PLAN a show card layout. FOLLOW the instructions in Instruction Sheet IV, MAKING SHOW CARDS.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a felt-tip pen, cardstock, and a list of store services, merchandise, and prices.

Make one show card.

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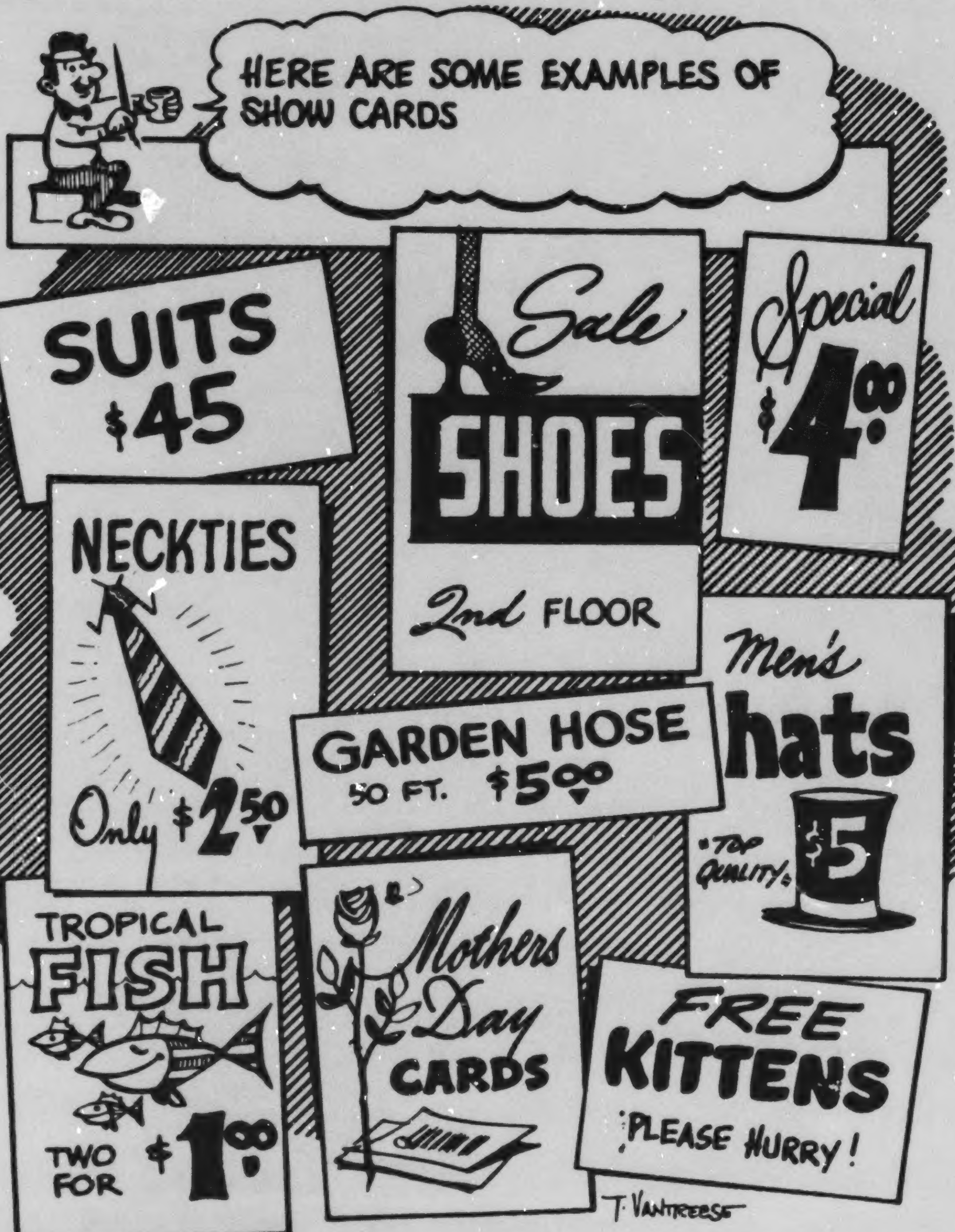
Instruction Sheet I

SHOW CARDS

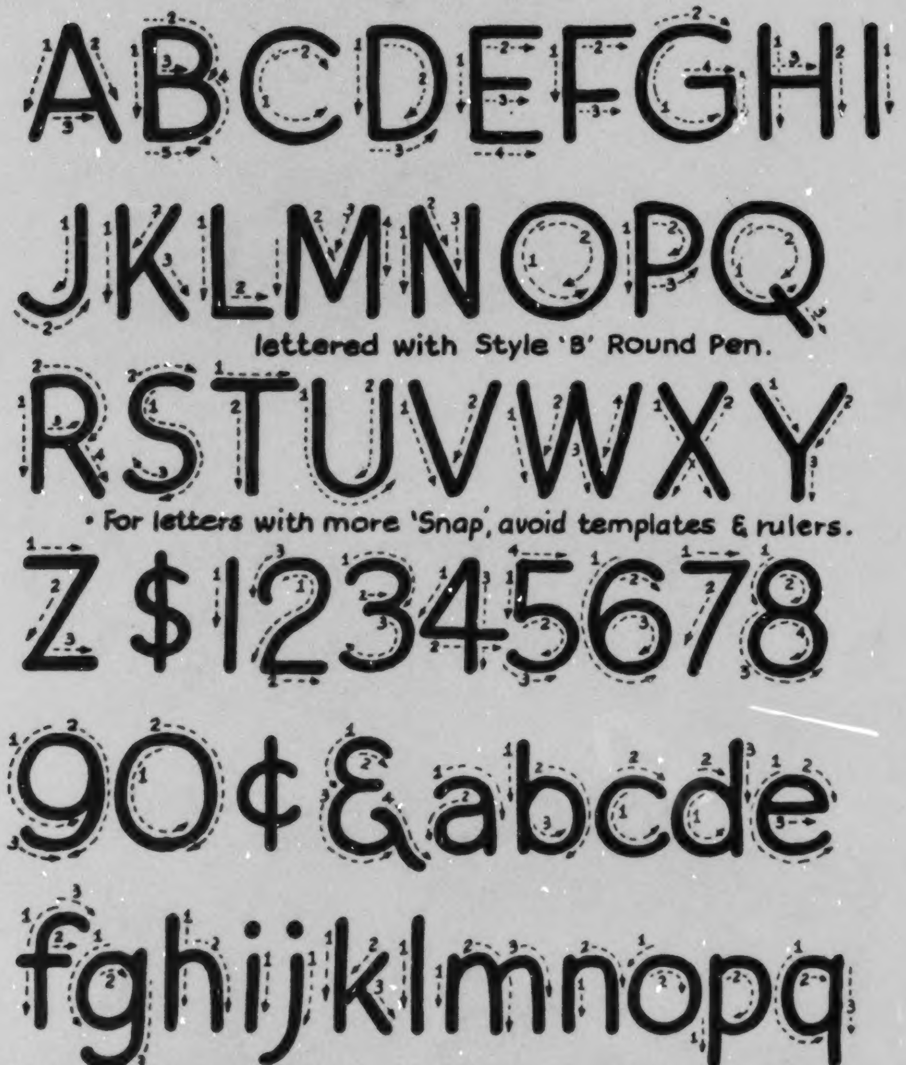
A show card is often referred to as "the silent salesperson." This is because it gives the customer information without his having to ask a salesperson.


HERE ARE SOME EXAMPLES OF SHOW CARDS
SUITS $45
Sale SHOES 2nd FLOOR
Special $4.00
NECKTIES Only $2.50
GARDEN HOSE 50 FT. $5.00
Men's hats TOP QUALITY $5
TROPICAL FISH TWO FOR $1.00
Mothers Day CARDS
FREE KITTENS PLEASE HURRY!
T. VANTREESE

Instruction Sheet II

THE GOTHIC ALPHABET AND NUMERALS

ONE-STROKE GOTHIC


ABCDEFGHI
JKLMNOPQ
RSTUVWXY
Z$12345678
90¢&abcde
fghijklmnopq
rstuvwxyz!?&.''
1234567890

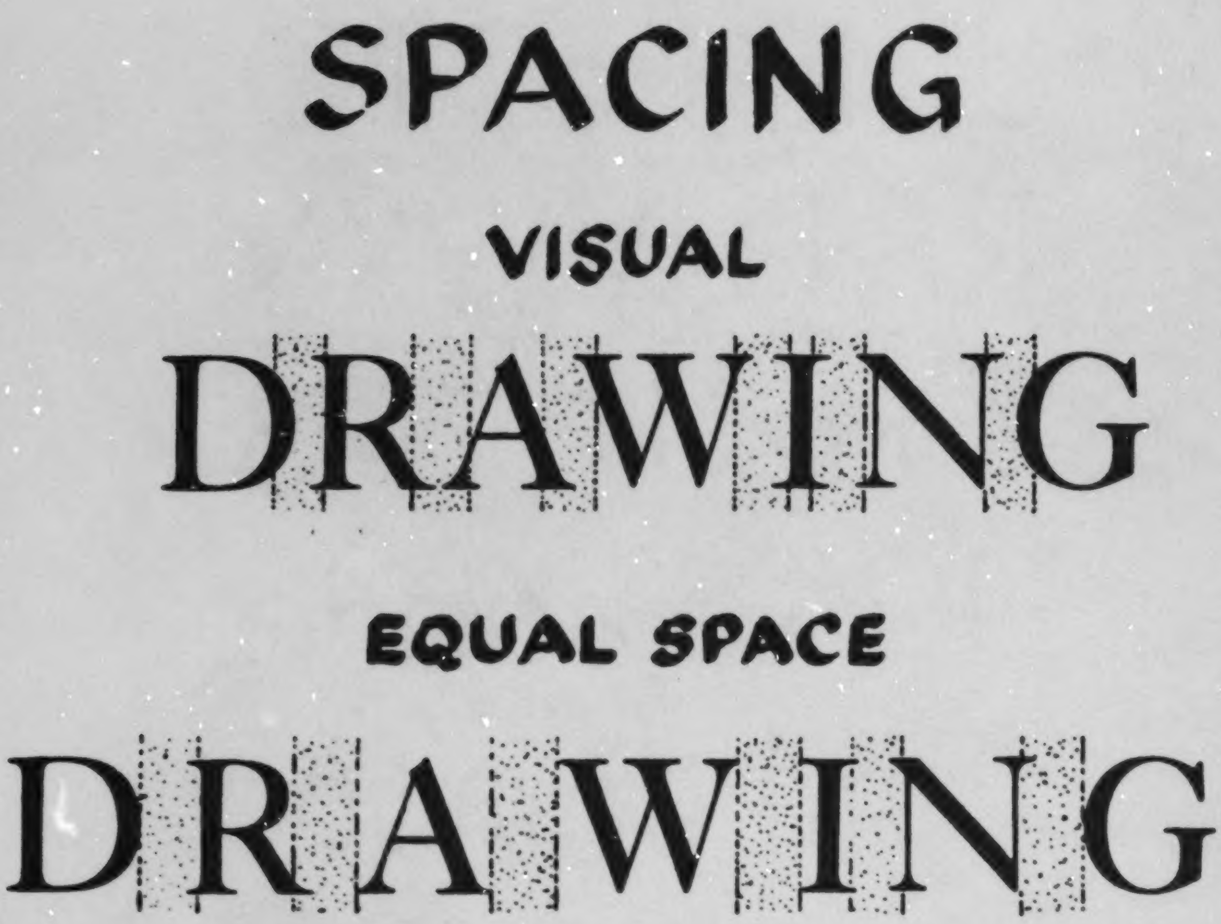
lettered with Style 'B' Round Pen.

• For letters with more 'Snap', avoid templates & rulers.

Instruction Sheet III

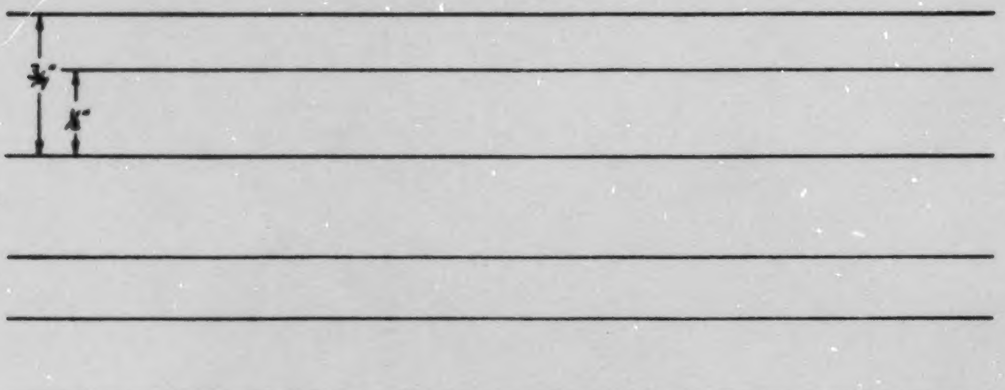
SPACING LETTERS AND NUMERALS

The lettering on show cards must be spaced so that it is attractive and easy to read. Study example of the two kinds of spacing below.

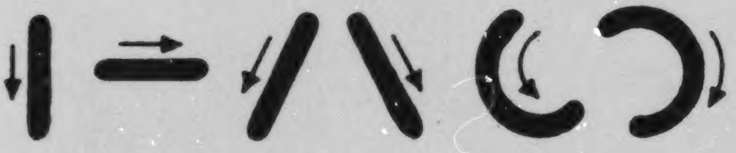

SPACING
VISUAL
DRAWING
EQUAL SPACE
DRAWING

Instruction Sheet III (p. 2)

Draw several lines using the dimensions shown below. USE YOUR OWN PAPER. Do not write on this page.



The basic strokes of the Gothic alphabet are shown below. Notice arrows on the figures. These indicate the direction the strokes should be made in the lettering process. Practice making these strokes using a felt-tip pen with a wide tip.



Instruction Sheet IV

MAKING SHOW CARDS

In making your show card keep these rules in mind:

1. Determine the purpose of the showcard. Decide if it is to:

   --Inform the customer about the price of a product.
   --Inform the customer about a new service.
   --Inform the customer about the use of the product.
   --Highlight a special feature about the product.
   --Inform the customer about a store service such as: "We Deliver" or "Charge Cards Accepted."

2. Use Gothic lettering.

3. Use eye-catching words and/or numbers. You may like to add a picture of the product.

4. Space the lettering for easy reading.

5. Keep the information brief so that it can be read quickly.

6. Spell all words correctly.

7. Make sure all amounts are correct.

8. Keep the show card clean and neat.

9. Be sure the completed show card satisfies the purpose for which it is intended.

Instructor's Final Checklist

MAKING SHOW CARDS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's show card:

	Accomplished	Not Accomplished
1. Was eye-catching	☐	☐
2. Was easy to read	☐	☐
3. Could be read quickly	☐	☐
4. Had all words spelled correctly	☐	☐
5. Had all amounts correct (if applicable)	☐	☐
6. Was clean and neat	☐	☐
7. Satisfied the purpose for which it was intended	☐	☐

Task Assignment Sheet PA-MD-19
Merchandise Displayer

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: SETTING UP COUNTER/TABLE-TOP DISPLAYS

INTRODUCTION

Counter and table-top displays are excellent "silent sales" aids. They also serve to decorate your school store. In this task assignment sheet you will learn how to plan and set up an attractive display.

OBJECTIVE(S)

GIVEN a display counter or table, merchandise, a plan, and other display supplies,

SET UP A COUNTER OR TABLE-TOP DISPLAY.

YOUR DISPLAY will be rated in accordance with your approved plan.

LEARNING ACTIVITIES

1. FIND advertisements, photographs, or illustrations in magazines and newspapers that immediately get your attention. SHARE one with your class, and TELL why it attracted your attention.
2. LOOK at a visual aid which illustrates the four phases of constructing a display. Your instuctor will provide the visual aid.
3. With a small group of classmates, PLAN your display. INCLUDE: a theme (idea), merchandise that will be displayed, a basic pattern for arranging the merchandise, accessories that will be used, props that will be used, and show cards that will be used. (Your instructor will help you.) WRITE the information needed and MAKE a sketch of your display.
4. LISTEN TO and WATCH an illustrated talk on constructing a display.
5. ANALYZE illustrations of displays. Your instructor will provide them.
6. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Set up the display which you planned in Learning Activity 3.

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Instructor's Final Checklist

SETTING UP COUNTER/TABLE-TOP DISPLAYS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The students' display was set up according to their approved plan:

	Accomplished	Not Accomplished
1. Theme	☐	☐
2. Merchandise	☐	☐
3. Arrangement pattern	☐	☐
4. Accessories	☐	☐
5. Props	☐	☐
6. Show cards	☐	☐

Task Assignment Sheet PA-MD-20
Manager

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PROOFING AD LAYOUTS

INTRODUCTION

Good advertising is important to stores, because it acquaints the public with the products and prices charged. The store manager carefully proofs (checks) ad layouts (plans) to make sure they meet all the requirements of good advertising. In this task assignment sheet, you will learn how to proof an ad layout.

OBJECTIVE(S)

GIVEN five newspaper ads and a proofing checklist,

PROOF THE AD BY COMPLETING A CHECKLIST FOR EACH ONE.

ALL ITEMS ON THE CHECKLIST should be accurately completed for at least four of the ads.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, GOOD ADVERTISEMENTS.
2. FIND several newspaper ads. PROOF each ad using the guidelines in Instruction Sheet I. SHARE your favorite ad with the class.
3. As a class, PLAN and PREPARE a display of good advertisements.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide five newspaper ads and a proofing checklist.

Fill out a proofing checklist for each ad.

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Instruction Sheet I

GOOD ADVERTISEMENTS*

While proofing ad layout, there are several things for which you must be on the lookout. They are listed below:

Purpose. The ad indicates exactly what you wish it to accomplish. There are two basic purposes of advertising:

Immediate Response is designed to cause the customer to buy a particular product from you within a short time --today, tomorrow, the weekend, or next week. Examples of such ads are clearance sales, special purchases, and seasonal items (white sales, Easter sales, etc.)

Attitude advertising is the type you use to keep your store's name before the public. Some people think of this as "image-building" advertising. With it, you remind people week after week about your merchandise and services or tell them about special services or policies.

Single Message. The ad is planned around only one idea.

Eye-Catching Headline. The headline tells what the ad is about and stands out from the rest of the copy.

Easy-to-Read Copy. The printed message is broken up by white space to allow the reader to see the lines quickly.

Instruction Sheet I (p. 2)

Store Identification. (This is called logotype.) The store is identified fully and clearly. Logotypes in printed ads should be clean-lined, uncluttered, and prominently displayed. They should give the store's name, address and telephone number.

Accurate Information. All information is accurate and all spelling is correct.

---

*Adapted from Small Marketers Aids, "Measuring the Results of Advertising," No. 121, Small Business Administration, Washington, D. C.

Instructor's Final Checklist

PROOFING AD LAYOUTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student accurately completed all items on the proofing checklist for the ad:

	Accomplished	Not Accomplished
1. Purpose	☐	☐
2. Message	☐	☐
3. Headline	☐	☐
4. Copy	☐	☐
5. Store Identification	☐	☐
6. Spelling	☐	☐

Task Assignment Sheet PA-MD-21
Manager

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PLANNING A GRAND OPENING

INTRODUCTION

Up to this point, you have been getting your store ready for business. Now it is time for the grand opening. Your grand opening must be very carefully planned, because you want your customer to form a good first impression of your store. In this task assignment sheet, you will learn how to plan a grand opening.

OBJECTIVE(S)

GIVEN the necessary supplies,

PLAN ONE PART OF YOUR STORE'S GRAND OPENING.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. PARTICIPATE in one of the planning committees below:

   THEME COMMITTEE: SELECT several themes for the grand opening. (Ask your instructor to give you a copy of the "Display Guide of Annual Events" you used in Task Assignment Sheet PA-MD-19.)

   MERCHANDISE COMMITTEE: IDENTIFY special merchandise you want to feature in the grand opening. ASSIGN price breaks to several pieces of the special merchandise.

   PROMOTIONAL ATTRACTIONS COMMITTEE: IDENTIFY several promotional attractions that will encourage customers to attend the grand opening. INCLUDE printed advertisements and gimics. Your instructor will give you some ideas.

   SHORT PLUG COMMITTEE: IDENTIFY some activities that will give a short plug for your store. Your instructor will give you some ideas.

2. PRESENT your selections to the class, and have them choose the ones suitable for the grand opening.

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3. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Each Committee: Prepare a written plan for your part in your store's grand opening.

Instructor's Final Checklist

PLANNING A GRAND OPENING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
In planning a grand opening, the:		
1. Theme Committee:		
a. Selected several themes suitable for the store..	☐	☐
b. Presented the themes to the class...............	☐	☐
c. Prepared a written copy of the theme selected by the class..................................	☐	☐
2. Merchandise Committee:		
a. Identified merchandise in stock.................	☐	☐
b. Identified special merchandise to be featured...	☐	☐
c. Assigned special price breaks to several pieces of special merchandise.........................	☐	☐
d. Presented the selections to the class...........	☐	☐
e. Prepared a list of special merchandise to be featured and the merchandise, which was approved by the class, to receive price breaks..	☐	☐
3. Promotional Attractions Committee:		
a. Identifed printed advertisement promotions......	☐	☐
b. Identified promotional gimics...................	☐	☐
c. Presented selections to class...................	☐	☐
d. Prepared written plans for promotional attractions selected by the class...............	☐	☐
4. Short Plug Committee:		
a. Identified short-plug activities which are appropriate for the store.......................	☐	☐
b. Presented the selections to the class...........	☐	☐
c. Prepared a written plan for the activities selected by the class...........................	☐	☐

Task Assignment Sheet PA-MD-22
Cashier-Checker

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: GETTING THE CASH DRAWER READY FOR BUSINESS

INTRODUCTION

To get ready for the day's business, the cash drawer must be prepared. To do this you check out a cash fund from the manager and place it in the drawer. You must also keep a record of the cash placed in the cash drawer. In this task assignment sheet you will learn how to get the cash drawer ready for business.

OBJECTIVE(S)

GIVEN a cash drawer, change fund, and Change Fund Receipt form,

GET THE CASH DRAWER READY FOR BUSINESS.

ALL COINS AND BILLS must be accurately listed and totaled on the Change Fund Receipt form and placed in the right section of the cash drawer.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, COUNTING THE CASH DRAWER.
2. PRACTICE filling out a Cash Fund Receipt form by completing Student Self-Check I, COUNTING THE CASH DRAWER.
3. STUDY and DISCUSS Instruction Sheet II, PLACING MONEY IN THE CASH DRAWER.
4. PRACTICE placing money in the cash drawer. Your instructor will tell you more about this activity.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a cash drawer, change fund, and Change Fund Receipt form.

Get the cash drawer ready for business.

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Instruction Sheet I

COUNTING THE CASH DRAWER

Before you start your work day, you will be given money to put in your cash drawer. This money is called a change fund. It is used for making change for customers.

It is very important for you to remember that you must account for every penny of this money. You should follow all of these steps as soon as you get your change fund:

1. Get a Change Fund Receipt form like this.
2. Count each kind of coin separately. Write each amount in the proper place on the Cash Fund Receipt form. See #1.
3. Add up the total amount of coins you received. Write this amount next to "Coins Total." See #2.
4. Count each kind of currency separately. Write each amount in the proper place. See #3.
5. Add up the total amount of currency you received. Write this amount next to "Currency Total." See #4.
6. Add the "Coins Total" and "Currency Total" amounts together. Write this amount next to "Total Change Fund." See #5.
7. Write the date in the proper space. See #6.
8. Write your cash register number in the proper space. See #7.
9. Sign your name. See #8.

CHANGE FUND RECEIPT

Pennies .... $______
Nickels .... $______
Dimes ...... $______ ①
Quarters ... $______
Halves ..... $______

② COINS TOTAL $______

$1.00 ...... $______
$5.00 ...... $______
$10.00 ..... $______ ③
$20.00 ..... $______

④ CURRENCY TOTAL $______

⑤ TOTAL CHANGE FUND $______

⑥ Date______ Register No.______ ⑦

⑧ Received by________________

Instruction Sheet I (p. 2)

Try this practice exercise: Read the Change Fund Receipt below.

How many pennies are in the change fund? Nickels? Dimes? Quarters? Halves?

How many $1.00 bills are in the change fund? $5.00 bills? $10.00 bills? $20.00 bills?

CHANGE FUND RECEIPT

Pennies	$ 1.00	
Nickels	$ 4.00	
Dimes	$ 5.00	
Quarters ...	$ 10.00	
Halves	$	
COINS TOTAL		$20.00
$1.00	$20.00	
$5.00	$20.00	
$10.00	$20.00	
$20.00	$20.00	
CURRENCY TOTAL		$80.00
TOTAL CHANGE FUND		$100.00

Date 7-25-80 Register No. 3

Received by John Doe

Student Self-Check I

COUNTING THE CASH DRAWER

Your instructor will give you a change fund and a Change Fund Receipt form. Count the change fund and fill out the form. Then check your answer with the one given at the bottom of the page or by your teacher. If your answer is wrong, read Instruction Sheet I again.

ANSWER:

CHANGE FUND RECEIPT

Pennies $1.50
Nickels $2.00
Dimes $5.00
Quarters ... $15.00
Halves $1.50

COINS TOTAL $25.00

$1.00 .... $15.00
$5.00 .... $15.00
$10.00 ...... $20.00
$20.00 ...... $

CURRENCY TOTAL $50.00

TOTAL CHANGE FUND $75.00

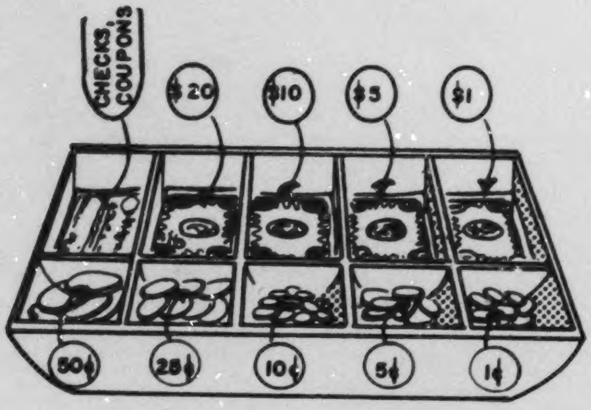
Date 3-21-80 Register No. 8

Received by Betty Jones

Instruction Sheet II

PLACING MONEY IN THE CASH DRAWER

The change fund is placed in the cash drawer for safety and convenience. Each kind of coin and bill should go into a separate space. The checks and coupons that you receive during the day go in the last section on the left side.



Instructor's Final Checklist

GETTING THE CASH DRAWER READY FOR BUSINESS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In getting the cash drawer ready for business, the student:

	Accomplished	Not Accomplished
1. Accurately listed all coins and bills on the Change Fund Receipt form	☐	☐
2. Placed the coins and bills in the right section of the cash drawer	☐	☐

Task Assignment Sheet PA-MD-23
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PLANNING A SALES GREETING/OPENING

INTRODUCTION

You want the grand opening of your store to be as successful as possible. To do this you must make your customers feel that you have something to offer them personally. Greeting the customer in a friendly, helpful manner is very important. In this task assignment sheet, you will learn how to greet the customer and open a sale.

OBJECTIVE(S)

GIVEN a Sales Greeting/Opening Worksheet listing five types of greeting/openers,

SELECT MERCHANDISE AND WRITE A SALES OPENER FOR EACH TYPE OF GREETING/OPENER.

EACH SALES OPENER should be appropriate for the merchandise, friendly, positive, and stated in a manner that should gain the customer's attention.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, BASIC BELIEFS ABOUT SELLING.
2. READ and DISCUSS Instruction Sheet II, OPENING THE SALE.
3. PARTICIPATE in a small-group session to create several sales openers for one of the five types of greeting/openers. (Your instructor will tell you more about this activity.) ROLE PLAY your openers for the class.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a Sales Greeting/Opening Worksheet.

Select merchandise and write a sales opener for each type of sales greeting/opener.

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Instruction Sheet I

BASIC BELIEFS ABOUT SELLING*

The following basic beliefs about selling will aid you in better serving your customers:

A customer is not a cold number, but a flesh-and-blood human being with feelings and emotions like your own.

A customer is a person who brings you needs and wants--it is your job to fill those needs and wants.

A customer does you a favor when calling on your store--you are not doing your customer a favor.

A customer is not an interruption of your work, but the purpose of it.

A customer deserves the most courteous and attentive treatment you can give.

A customer is part of your business--not an outsider.

A customer is the most important person in any business.

---

*Adapted by permission from Model/School Store Management Guide, North Dakota State Board for Vocational Education.

Instruction Sheet II

OPENING THE SALE*

As we said before, greeting the customer in a friendly, positive manner is very important. There are several types of effective sales openers which can be used. These include:

Question Opener. Asking the customer an interesting question is an excellent device for gaining attention, because most people automatically answer a question out of habit or courtesy. However, the question should be worded so that the customer can answer "yes."

The successful question opener should imply within the question itself the benefits that the customer can expect to gain from purchasing the product.

Example: "Do you think this T-shirt would help promote your school spirit?"

Curiosity Opener. If the salesperson can arouse the curiosity of the customer, chances are that the customer will want to hear more about the product. Thus, the salesperson should attempt to find an opener that will appeal to the customer's curiosity.

Example: "Have you seen the thinest, pocket-size calculator?"

Special-Interest Opener. Every customer has a strong personal interest in his/her home, health, income, job, and hobbies. By referring to the customer's interest, the salesperson is likely to win favorable attention.

Example: "I know that you collect baseball caps. Let me show you our new one with the school logo."

Exhibit Opener. Models, samples, charts, and, of course, the product itself attract the attention of the customer because they catch his/her eye.

Example: A display of merchandise.

Merchandise Opener. A salesperson may begin a sale by making a remark about the merchandise itself. This type of opener is used most often in retail selling. When a salesperson notices a customer examining merchandise, he/she should make a remark about the merchandise rather than interrupt the customer with a personal greeting. In this way, the salesperson keeps the customer's mind on the merchandise.

Example: "This is the most mod jacket that you can buy."

---

*Ibid.

Instructor's Final Checklist

PLANNING A SALES GREETING/OPENING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In completing the Sales Greeting/Opening Worksheet, the student:

	Accomplished	Not Accomplished
1. Completed a sales opener for each of the five types of greeting/openings................................	☐	☐
2. Each sales opener was:		
a. Appropriate for the merchandise................	☐	☐
b. Friendly....................................	☐	☐
c. Positive....................................	☐	☐
d. Stated in a manner that should gain the customer's attention..........................	☐	☐

Task Assignment Sheet PA-MD-24
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: DETERMINING CUSTOMER WANTS AND NEEDS

INTRODUCTION

After you have greeted the customer and opened the sale, you must determine the customer's wants and needs. This will enable you to suggest, demonstrate, and recommend the best types of merchandise. In this task assignment sheet you will learn how to determine a customer's wants and needs.

OBJECTIVE(S)

GIVEN a Customer Wants and Needs Worksheet,

SELECT TEN PRODUCTS AND WRITE A QUESTION CONCERNING EACH PRODUCT.

EACH QUESTION should serve as an aid to help determine a customer's wants and needs.

LEARNING ACTIVITIES

1. READ AND DISCUSS Instruction Sheet I, DETERMINING CUSTOMER WANTS AND NEEDS.
2. PRACTICIPATE in a class rap session. COMPOSE some appropriate questions concerning some of the merchandise you have in your school store.
3. ROLE PLAY a salesperson determining a customer's wants and needs. Your instructor will tell you more about this activity.
4. ARRANGE to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a Customer Wants and Needs worksheet.

Select ten products you have in your school store. Write a question for each product that you could ask a customer to help you determine his/her wants and needs.

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Instruction Sheet I

DETERMINING CUSTOMER WANTS AND NEEDS*

You are somewhat like a doctor who must first diagnose the patient before treatment can be prescribed.

An effective method of determining a customer's needs is to ask questions. You will find the following rules helpful.

1. Look the customer in the eye. This will draw attention directly to you.
2. Avoid the use of "I". Use "you" instead. For example, say "Would you like to see how our new product can save time?" rather than "I know these widgets will save time."
3. Do not interrupt a customer while he/she is talking by asking a question. Wait until he/she has finished the statement, pause, and then ask your question.
4. Avoid asking questions that prompt a simple "yes" or "no" answer. The purpose of asking the questions is to get the customer to talk. For example, you should ask, "What colors of shirts appeal to you" rather than, "do you like blue shirts?"
5. Make your questions brief. Short, to-the-point questions are more easily understood.

Determining a customer's needs during the sales approach is particularly important to you, since you usually do not know anything about the customer before you meet. Therefore, you should listen carefully to the customer's opening remarks for clues about his/her needs and what merchandise will fill those needs.

But if a customer does not readily indicate what is wanted, than you must use other methods. For example, observe the customer's clothes, actions, and attitudes. Ask questions concerning the intended use of the merchandise.

---

*Adapted by permission from Model/School Store Management Guide, North Dakota State Board for Vocational Education.

Instructor's Final Checklist

DETERMINING CUSTOMER WANTS AND NEEDS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In completing the Customer Wants and Needs Worksheet, the student:

	Accomplished	Not Accomplished
1. Wrote a question concerning each of the ten products..	[ ]	[ ]
2. Composed questions that could be used to determine a customer's wants and needs................................	[ ]	[ ]

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: GETTING INFORMATION ABOUT MERCHANDISE

INTRODUCTION

A thorough knowledge of merchandise is necessary so that you can answer questions that are asked about it. The best ways for you to prepare to serve a customer are to learn the outstanding features of the products and to determine the benefits of the product. In this task assignment sheet, you will learn how to get information about merchandise.

OBJECTIVE(S)

GIVEN a product,

IDENTIFY SIX FEATURES AND SIX BENEFITS OF THE PRODUCT.

EACH FEATURE should tell what the product has or is; EACH BENEFIT should tell what the product can do for the customer.

LEARNING ACTIVITIES

1. SELECT a product from your school store. OBTAIN as much information as possible about the product. REFER to sources such as: the product itself, all labels or other information attached to the product, the use-and-care manual, advertisements, persons who use the same kind of product. WRITE down all the information you obtained.

2. STUDY Instruction Sheet I, WHAT DO CUSTOMERS WANT FROM A PRODUCT? NOTE benefits that customers may receive by using the product you have selected.

3. GROUP your product information by "Features of the Product" and "Benefits of the Product." (See the objective on this page.)

4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

List six features and six benefits of the product you selected in Learning Activity 1. You may refer to the groupings you did for Learning Activity 3.

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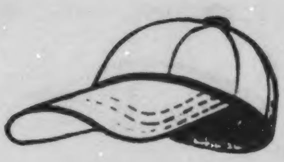
Instruction Sheet I

WHAT DO CUSTOMERS WANT FROM A PRODUCT

Benefits are really quite different from features. Look at this cap. What are its features? A well made cap. A sturdy bill with three rows of stitching.



What benfits does it offer a customer? Some benefits might appeal to the emotions: neat appearance, smart look. Other benefits are real: full comfort, protection from weather.

Most often, it's the benefits that really sell a customer. But you must be familiar with the features of a product before you can describe its benefits.

Here are some of the most common reasons customers buy a product:

1. Appearance
2. Comfort
3. Distinctiveness
4. Economy
5. Prestige
6. Protection
7. Seasonability
8. Security
9. Sentiment
10. Suitability
11. Trade name

Instructor's Final Checklist

GETTING INFORMATION ABOUT MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In identifying features and benefits of a product, the student:

	Accomplished	Not Accomplished
1. Selected a product	[ ]	[ ]
2. Listed six features of the product (what the product has or is)	[ ]	[ ]
3. Listed six benefits of the product (what the product can do for the customer)	[ ]	[ ]

Practical Arts

TASK: PLANNING TO DESCRIBE AND DEMONSTRATE MERCHANDISE

INTRODUCTION

In order to create a desire for the product, the salesperson explains and demonstrates the product for the customer. This action requires careful planning, not just an "off-the-top-of-the-head" speech. In this task assignment sheet, you will learn how to make a plan to describe and demonstrate merchandise.

OBJECTIVE(S)

GIVEN a Describing and Demonstrating Merchandise Worksheet,

MAKE A PLAN TO DESCRIBE AND DEMONSTRATE ONE PRODUCT SELLING POINT.

ALL SECTIONS of the Worksheet should be completed.

LEARNING ACTIVITIES

1. OBTAIN a copy of your Check-Out Activity Sheet for Task Assignment Sheet PA-MD-25, "Getting Information About Merchandise." SELECT one benefit for the product listed. This is the selling point.
2. WRITE a short story describing the selling point you selected in Learning Activity 1.
3. READ Instruction Sheet I, THE ART OF DEMONSTRATING.
4. PLAN a demonstration of the selling point you selected. IDENTIFY the supplies you will need; LIST the steps you will go through; and DESCRIBE ways you can get the customer involved in your demonstration.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a Describing and Demonstrating Merchandise Worksheet.

Complete the Worksheet for the product selling point you selected in Learning Activity 1. Use the notes you prepared for Learning Activities 2 and 4 as a guide.

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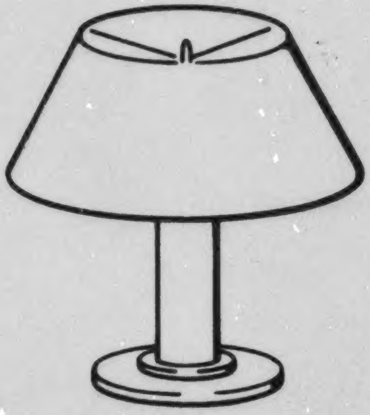
Instruction Sheet I

THE ART OF DEMONSTRATING

The key to demonstrating any product is in getting your customer to participate ...to try it themselves. Some of the most powerful sales motivators are our own five senses. When you buy shoes you want to put them on to see how they feel. That's obvious and natural enough. But what about other products?

If you can get your customer to participate through the senses, to see, to touch, even in some cases to hear, smell, and taste the products, you're just about ready to make a sale.

Look at this picture of a lamp. How many different ways can you think to demonstrate it?



First of all, you can show it. Your customer can see the shape and the colors of the lamp. Then you can let the customer touch it to feel the textures of the shade and the base. You can even turn it on and off a few times to let the customer hear it.

Demonstrate to the senses.

Instructor's Final Checklist

PLANNING TO DESCRIBE AND DEMONSTRATE MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student completed all sections of the Describing and Demonstrating Merchandise Worksheet:

	Accomplished	Not Accomplished
1. Product	☐	☐
2. Selling Point	☐	☐
3. Story Explaining Selling Point	☐	☐
4. Demonstration		
a. Supplies Needed	☐	☐
b. Procedure	☐	☐
c. Customer Involvement	☐	☐

Task Assignment Sheet PA-MD-27
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: HANDLING CUSTOMER OBJECTIONS

INTRODUCTION

Occasionally customers raise objections regarding the merchandise you are showing. Rather than becoming discouraged, you can turn an objection into a tool to strengthen your sales presentation. In this task assignment sheet, you will learn how to handle customer objections.

OBJECTIVE(S)

GIVEN eight customer objections,

WRITE POSSIBLE ANSWERS FOR EACH OBJECTION.

AT LEAST TWO ANSWERS should be written for each objection.

LEARNING ACTIVITIES

1. INTERVIEW your parents or a friend of your family who have had objections regarding buying merchandise. TAPE the interview if you can. SHARE your interview with the class.
2. READ and DISCUSS Instruction Sheet I, OBJECTION ANALYSIS CHART.
3. WRITE objections you can anticipate regarding a product. Your instructor will tell you more about this activity.
4. READ and DISCUSS Instruction Sheet II, ANSWERING OBJECTIONS.
5. WRITE possible answers to your objections in Learning Activity 3. DISCUSS your answers in class.
6. ROLE PLAY, with a classmate, a salesperson dealing with a customer objection.
7. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide an Objections Worksheet.

Write at least two possible answers for each objection listed.

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Instruction Sheet I

OBJECTION ANALYSIS CHART

You cannot expect to be able to answer all objections the minute they are made. So the smart thing to do is to anticipate objections and prepare answers before the customer brings them up. Look at the product through the eyes of the customer.

There are six basic types of objections. Study the Objection Analysis Chart below.

OBJECTION ANALYSIS CHART

(Product: Car)

Type of Objection	Possible Objection	Possible Answer
Product	I was hoping to find a car with dark seat covers.	The dark seat covers are attractive, but they do absorb heat and are very hot during the summer months. We have found that the neutral colors provide more year-around comfort.
Source	Your company carries only one line of cars? I thought such a big company would carry several.	Many companies do carry several lines of cars. But we have found that by specializing in only one line, we can offer our customers better service.
Service	I hear that a lot of dealers have trouble getting replacement parts for their cars. Do you?	It's true that some dealers are having that trouble. Fortunately, most dealers that handle this car are well supplied with replacement parts. (A response such as this should be used only if it is true.)
Price	This car is priced higher than the X model.	That may be true, but we feel our car is one of the best on the market. We have one of the best warranties offered.

Instruction Sheet 1 (p. 2)

Type of Objection	Possible Objection	Possible Answer
Need	I'm not sure I need a second car.	I used to feel the same way you do until I bought a second car. Now I don't know how I did without it. My spouse uses it to run all the errands--taking the children here and there, going to the grocery, etc.--that I used to spend so much time doing.
Time	It would be nice to have a second car, but I believe I can do without it a while longer.	Of course, you don't want to rush into things. But our customers tell us that this is the perfect second car. It is economical to operate and performs well in traffic. And it allows the husband and wife more leisure time, since one does not have to wait for the other to use the car.

Instruction Sheet II

ANSWERING OBJECTIONS

There are several general rules you can follow when answering objections:

Listen carefully to the objection. You cannot begin to answer the objection until you find out what it is.

Make the customer feel that his/her opinion is respected. Never give any indication that you are annoyed. Statements such as "I'm glad that you mentioned that" or "I can understand how you feel" make the customer feel that you are reliable and honest.

Make sure you understand the objection. If you are not sure what the customer is saying, ask a tactful question: "Is there a point I have not made clear?" or "Is there a problem, Mr. _____?"

Try to answer the objection as soon as it is raised. Putting off answering a complaint may make the customer think you don't know the answer or are trying to ignore the objection.

Restate the objection. Let the customer know that you understand the objection. For instance, you may treat the objection as a question, "It is correct that you feel. . .?"

Answer briefly. Answer the objection with a short, sincere reply, and go on with your sales presentation.

Make your reply fit the customer. Observe your customer, and choose a reply that fits his/her personality and interests.

Make sure you have answered the objection. Find out whether you have satisfactorily answered the objection. If the customer does not let you know, you may ask, "Have I answered your question to your safisfaction?"

Instructor's Final Checklist

HANDLING CUSTOMER OBJECTIONS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
In completing the Objections Worksheet, the student wrote two possible answers for each of the eight objections...	[ ]	[ ]

Task Assignment Sheet PA-MD-28
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PLANNING A SALES CLOSING

INTRODUCTION

"Closing" a sale is a special term used by salespersons. It means getting your customer to decide "yes." There are several good ways to close a sale. In this task assignment sheet, you will learn ways to close a sale.

OBJECTIVE(S)

GIVEN a Sales Closing Worksheet listing closing methods,

WRITE A SALES CLOSING FOR EACH METHOD.

EACH SALES CLOSING should fulfill the requirements of the method indicated.

LEARNING ACTIVITIES

1. LIST ways salespersons have urged you or your parents to buy merchandise. CHECK the ways that you feel are best. SHARE your list with the class.
2. READ and DISCUSS Instruction Sheet I, CLOSING A SALE.
3. WATCH your instructor demonstrate each sale closing method.
4. ROLE PLAY with a small group of classmates one of the sales closing methods. Your instructor will tell you more about this activity.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a Sales Closing Worksheet.

Write a sales closing for each method listed.

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Instruction Sheet I

CLOSING A SALE

"Closing" is what selling is all about. Each of the following is a good way to convince your customer to buy:

Review your selling points. Sum up the selling points you used in describing and demonstrating the product.

Assume the customer wants to buy. Toward the end of your sales presentation, you may ask a question such as, "This is the model you want, isn't it? or "When do you want this delivered?"

Offer the customer something extra. This is a technique that is used frequently. The customer buys a product and gets a bonus. For instance, you may offer a bonus pencil with the purchase of a notebook.

Point out that this is the last chance to buy the product. For example, "This is the last T-shirt we have in your size." This method should be used only when it is true.

Ask the customer to buy. At the end of your sales presentation, ask your customer directly to buy the product. For example, "May I sell you this today?"

Instructor's Final Checklist

PLANNING A SALES CLOSING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In completing the Sales Closing Worksheet, the student wrote a sales closing which fulfilled the requirements of the method indicated:

	Accomplished	Not Accomplished
1. Review Selling Points	☐	☐
2. Assume a Closing	☐	☐
3. Offer Something Extra	☐	☐
4. Last Chance to Buy	☐	☐
5. Ask Directly	☐	☐

Task Assignment Sheet PA-MD-29
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: MAKING A SALES PRESENTATION

INTRODUCTION

If you are to make a good sales presentation, you cannot rely on your ability to create one on the spur of the moment. You must decide what you are going to say and how you are going to demonstrate your product. In this task assignment sheet, you will learn how to make a sales presentation.

OBJECTIVE(S)

GIVEN a product and a customer,

MAKE A SALES PRESENTATION.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. CHOOSE a product to use for you sales presentation.
2. OBTAIN the Check-Out Activity Sheets for these Task Assignment Sheets: 23, 24, 25, 26, 27, and 28. USE these planning sheets to prepare your sales presentation for your chosen product.
3. READ and DISCUSS Instruction Sheet I, MAKING A SALES PRESENTATION.
4. WATCH your instructor demonstrate making a sales presentation.
5. PRACTICE your sales presentation at home.
6. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Make a sales presentation for the product you chose in Learning Activity 1. Your instructor or a classmate may role play the part of the customer.

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Instruction Sheet I

MAKING A SALES PRESENTATION

A super-salesperson will follow these procedures when making a sales presentation.

1. Promptly approach the customer with a friendly greeting.
2. Show an interest in the customer.
3. Listen carefully to what the customer says and watch what he/she is doing in order to determine his/her needs and wants.
4. Ask a question(s) to clarify exactly what the customer needs and wants.
5. Open the sale by making a brief statement (preferably about the product) that gains the customer's interest.
6. Provide additional facts and information (selling points) about the product.
7. Demonstrate the product with ease. Include the customer in your demonstration by appealing to at least one of his/her five senses.
8. Show enthusiasm when presenting your product.
9. Listen to the customer's objections and answer each objection respectfully and honestly.
10. Close the sale, using a method appropriate to the sales situation.

Instructor's Final Checklist

MAKING A SALES PRESENTATION

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In making a sales presentation, the student:

	Accomplished	Not Accomplished
1. Promptly approached the customer with a friendly greeting	[ ]	[ ]
2. Showed an interest in the customer	[ ]	[ ]
3. Carefully listened and watched the customer to determine his/her needs and wants	[ ]	[ ]
4. Asked a question(s) to clarify exactly what the customer needed and wanted	[ ]	[ ]
5. Opened the sale by making a brief, interesting statement about the product	[ ]	[ ]
6. Described the selling points of the product	[ ]	[ ]
7. Demonstrated the product with ease	[ ]	[ ]
8. Included the customer in the demonstration	[ ]	[ ]
9. Answered any objections respectfully and honestly	[ ]	[ ]
10. Showed enthusiasm	[ ]	[ ]
11. Used an appropriate sales closing method	[ ]	[ ]

Task Assignment Sheet PA-MD-30
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: FILLING OUT SALES TICKETS

INTRODUCTION

At the close of a sale, you prepare a sales ticket. A sales ticket is a written record of the sale for both the store and the customer. For this reason, you must take particular care in filling it out. In this task assignment sheet, you will learn how to fill out a sales ticket.

OBJECTIVE(S)

GIVEN a description of a sale and a sales ticket,

FILL OUT THE SALES TICKET.

THE SALES TICKET should be neat, easy to read, and include accurate information in the correct spaces.

LEARNING ACTIVITIES

1. BRING a completed sales ticket to class. COMPARE your sales ticket with some that your classmates have brought.
2. READ, STUDY, and DISCUSS Instruction Sheet I, FILLING OUT A SALES TICKET.
3. WATCH your instructor demonstrate how to fill out a sales ticket.
4. PRACTICE filling out a sales ticket. Your instructor will provide the sales information and a sales ticket.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a description of a sale and a sales ticket.

Fill out the sales ticket.

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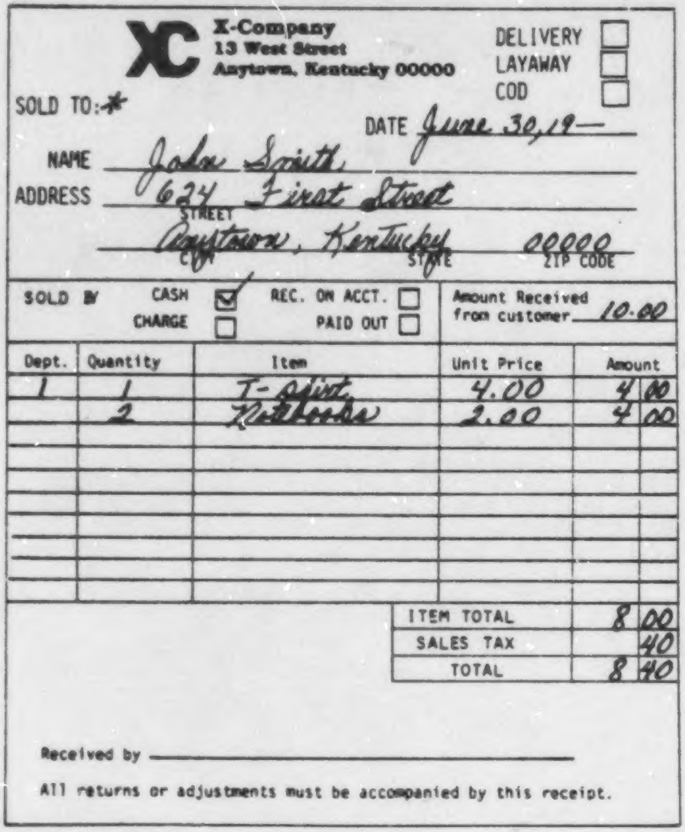
Instruction Sheet I

FILLING OUT A SALES TICKET

One of the most important forms that a salesperson must be able to fill out is the sales ticket. Study the illustration of the sales ticket below.



X-Company
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:*

DATE June 30, 19—

NAME John Smith

ADDRESS 624 First Street
STREET

Anytown, Kentucky 00000
CITY STATE ZIP CODE

SOLD BY CASH ☑ CHARGE ☐ REC. ON ACCT. ☐ PAID OUT ☐

Amount Received from customer 10.00

Dept.	Quantity	Item	Unit Price	Amount	
1	1	T-shirt	4.00	4	00
	2	Notebooks	2.00	4	00

ITEM TOTAL	8	00
SALES TAX		40
TOTAL	8	40

Received by ____________________

All returns or adjustments must be accompanied by this receipt.

* For a cash sale, some stores omit the name and address. They must include it: (1) for a charge sale, (2) when merchandise is to be delivered, or (3) when merchandise is held for the customer until a later date.

Instructor's Final Checklist

FILLING OUT A SALES TICKET

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's sales ticket was:	Accomplished	Not Accomplished
1. Neat..	☐	☐
2. Easy to read................................	☐	☐
3. Included accurate information in the correct spaces..	☐	☐

Task Assignment Sheet PA-MD-31
Cashier-Checker, Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: EXAMINING CHECKS

INTRODUCTION

Many customers use checks to pay for merchandise they purchase. It is essential that you examine each check very carefully to be sure it is valid. It is also important that you examine the customer's identification to make sure the signature on the check is valid. In this task assignment sheet, you will learn how to examine checks.

OBJECTIVE(S)

GIVEN three checks,

IDENTIFY THE CHECK THAT IS ACCEPTABLE.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, EXAMINING THE FRONT OF THE CHECK.
2. EXAMINE checks that your teacher shows you.
3. READ and DISCUSS Instruction Sheet II, EXAMINING THE BACK OF THE CHECK.
4. EXAMINE the endorsements in Student Self-Check I, EXAMINING ENDORSEMENTS.
5. READ and DISCUSS Instruction Sheet III, EXAMINING IDENTIFICATION.
6. IDENTIFY items that are acceptable identification. Your instructor will tell you more about this activity.
7. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide three checks.

Write the number of the check that is acceptable.

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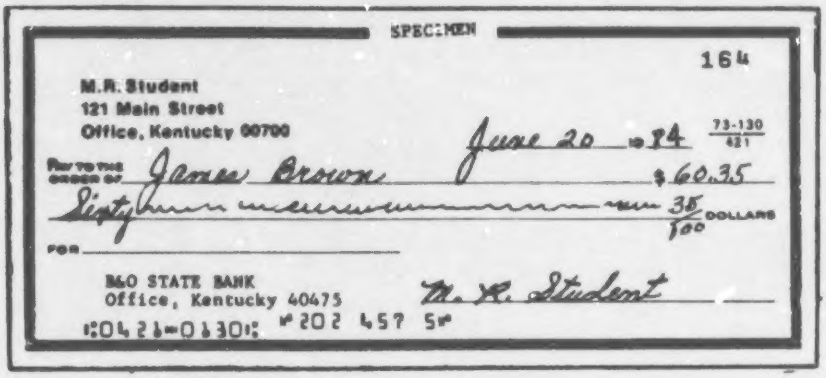
Instruction Sheet I

EXAMINING THE FRONT OF A CHECK

Many stores lose money because they have accepted a "bad" check. For this reason, salespeople and cashier-checkers are cautioned to examine each check very carefully.



SPECIMEN

164

M.R. Student
121 Main Street
Office, Kentucky 00700

June 20 19 84

73-130
421

PAY TO THE ORDER OF James Brown $ 60.35

Sixty 35/100 DOLLARS

FOR

B&O STATE BANK
Office, Kentucky 40475

M. R. Student

⑆0421-0130⑆ ⑈202 457 5⑈

There are features on the front of a check that should be examined:

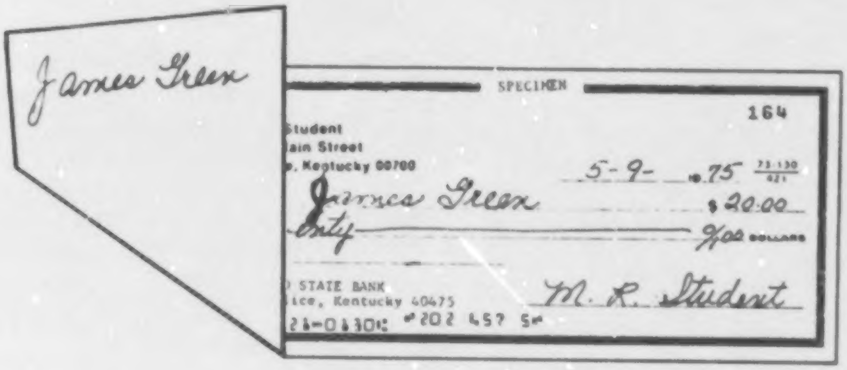
1. The date must be on or a few days before the day you receive it. It should not show a later date.
2. The "Pay to the Order of" line must be filled in.
3. The Amount number must be in figures and in writing, and they must agree.
4. The check must be signed. The signature and the printed name must agree.

Instruction Sheet II

EXAMINING THE BACK OF THE CHECK

The person who uses a check that he/she has received from someone else is required to sign it on the back. This is called "endorsement." A good example of this is cashing a paycheck. Before the employee can cash it, he/she must sign it on the back. A salesperson or cashier-checker must be absolutely certain that a check that does not have the customer's signature on the front is endorsed on the back.

The manner in which checks must be endorsed depends on the situation. This check was written by M.R. Student and passed to James Green. Mr. Green must endorse the check.



James Green

SPECIMEN

164

Student
ain Street
, Kentucky 00700

5-9- 75

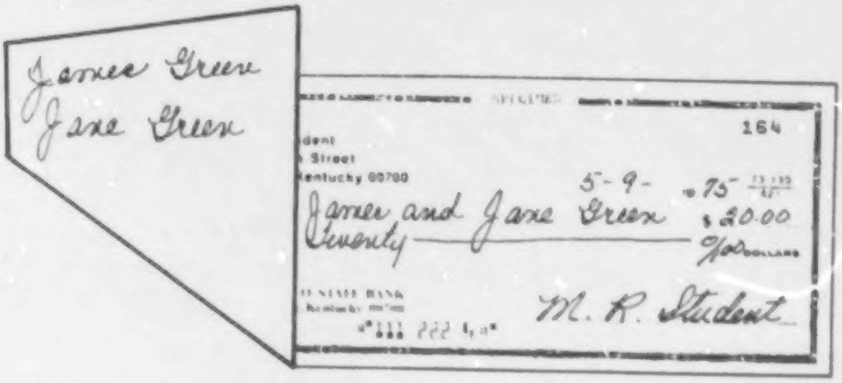
James Green $20.00

nty 00/00 DOLLARS

STATE BANK
ice, Kentucky 40475
21-0130: #202 457 5#

M. R. Student

This check was written by M.R. Student and passed to James and Jane Green. Both James and Jane Green must endorse the check.



James Green
Jane Green

164

dent
Street
Kentucky 00700

5-9- 75

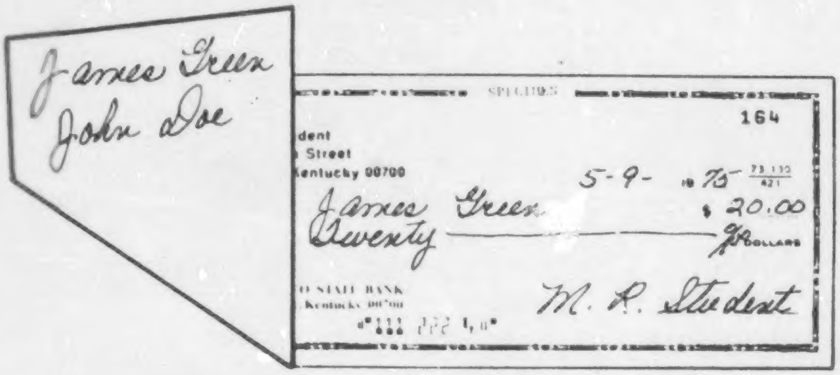
James and Jane Green $20.00

Twenty 00/00 DOLLARS

M. R. Student

Instruction Sheet II (p. 2)

This check was written by M.R. Student and passed to James Green. James Green endorsed the check and used it to pay John Doe. John Doe must endorse the check also.



James Green
John Doe

SPECIMEN

164

dent
Street
Kentucky 00700

5-9- 19 75 73-130/421

James Green $ 20.00

Twenty —————— 00/100 DOLLARS

STATE BANK
Kentucky

M. R. Student

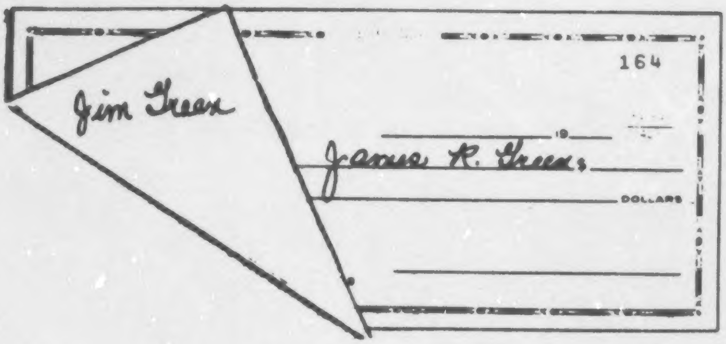
All owners of a check must endorse it before it can be cashed or passed on to someone else.

Student Self-Check I

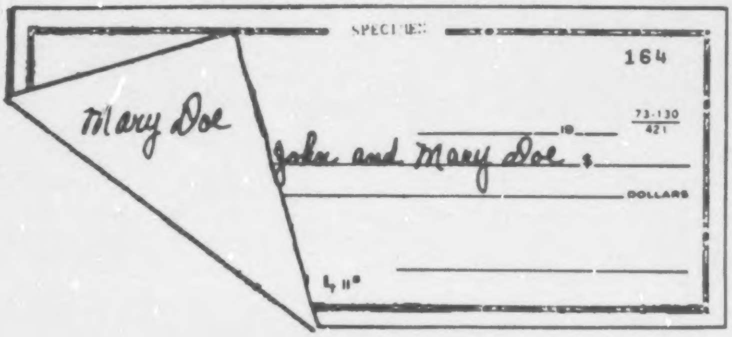
EXAMINING ENDORSEMENTS

Write answers for each blank below. USE YOUR OWN PAPER. Do not write on this page. When you have finished, compare your answers with the ones on the next page.

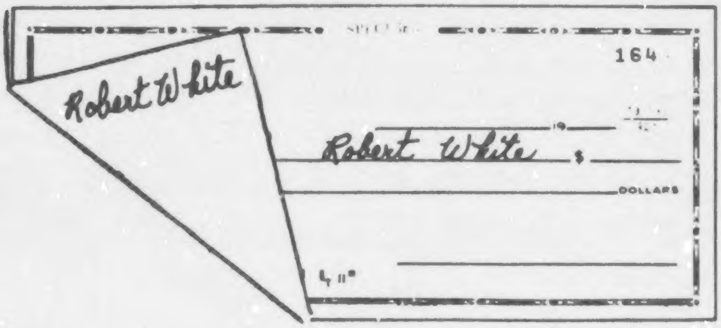
1. Is this check properly endorsed? _____
2. If not, write it correctly. _____


164
Jim Green
19
James R. Green
$
DOLLARS

1. Is this check properly endorsed? _____
2. If not, write is correctly. _____


SPECIMEN
164
Mary Doe
19
73-130
421
John and Mary Doe
$
DOLLARS

1. Is this check properly endorsed? _____
2. If not, write it correctly. _____
3. If Paul Runyan is cashing this check, complete the endorsement. _____


164
Robert White
19
Robert White
$
DOLLARS

Student Self-Check I (p. 2)

ANSWERS

1. Is this check properly endorsed?
   No
2. If not, write it correctly.
   James R. Green

1. Is this check properly endorsed?
   No
2. If not, write it correctly.
   John Doe, Mary Doe

1. Is this check properly endorsed?
   Yes
2. If not, write it correctly.
   ______
3. If Paul Runyan is cashing this check, complete the endorsement. Paul Runyan

Instruction Sheet III

EXAMINING IDENTIFICATION

Endorsers of a check must be adequately identified. There are three ways of identifying an endorser:

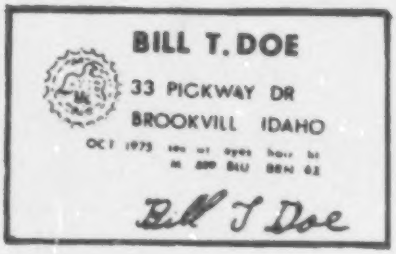
a. Know him/her yourself.
b. Have a responsible person who knows the endorser to identify him/her.
c. Investigate him/her through identification papers.

You should become familiar with some kinds of identification that are normally used. Some of these are:

Social Security cards
Selective Service registration cards
Company ID cards
College and University ID cards
Drivers license
Credit cards
Hospital insurance cards
U.S. passports

Some identification is more reliable than others. For example, a Social Security card may be obtained by making application only. No effort is made to determine whether the applicant has given his/her real name or address. On the other hand, an applicant must undergo a thorough investigation to obtain a Selective Service registration card. For this reason, a Selective Service registration card is more reliable than is a Social Security card.

In addition to requiring investigation before it is issued, a reliable credential contains a description of the owner of the card and his/her signature.

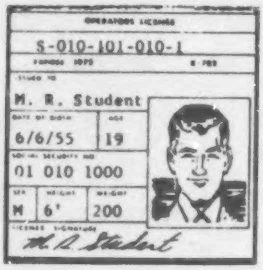


BILL T. DOE
33 PICKWAY DR
BROOKVILL IDAHO

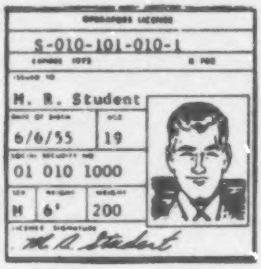
Bill T Doe

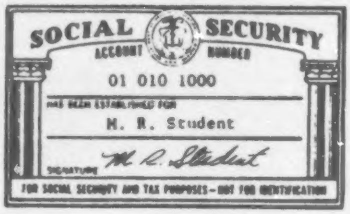
Instruction Sheet III (p. 2)

Better still is an identification that includes a picture of the owner.


OPERATORS LICENSE
S-010-101-010-1
M. R. Student
6/6/55
19
01 010 1000
M
6'
200
M. R. Student

Some stores require more than one identification. In this case the descriptions and signatures on all documents should match. If they do not, they are considered worthless.


OPERATORS LICENSE
S-010-101-010-1
M. R. Student
6/6/55
19
01 010 1000
M
6'
200
M. R. Student


SOCIAL SECURITY
ACCOUNT NUMBER
01 010 1000
HAS BEEN ESTABLISHED FOR
M. R. Student
SIGNATURE
M. R. Student
FOR SOCIAL SECURITY AND TAX PURPOSES—NOT FOR IDENTIFICATION

When examining identification, take these precautions:

1. Compare the description with the person presenting it.
2. If more than one is used, compare the information on all of them to make sure it agrees.
3. Record the type and number of the identification on the back of the check.

Instructor's Final Checklist

EXAMINING CHECKS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In examining checks, the student:

	Accomplished	Not Accomplished
1. Identified the one acceptable check..................	[ ]	[ ]
2. Wrote the number of the acceptable check.............	[ ]	[ ]

Task Assignment Sheet PA-MD-32
Salesperson, Cashier-checker

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: MAKING CHANGE

INTRODUCTION

Making change is a very important part of a salesperson or cashier-checker's job. Nothing is more important to the customer and the store than that the money is handled correctly. In this task assignment sheet, you will learn how to make change.

OBJECTIVE(S)

GIVEN a cash drawer, money, merchandise, and a customer,

MAKE CHANGE AND COUNT IT OUT TO THE CUSTOMER.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, MAKING CHANGE.
2. WATCH your instructor demonstrate making change.
3. SOLVE problems dealing with making change. Your instructor will provide the problems.
4. READ and DISCUSS Instruction Sheet II, SUBTRACTING CENTS WHEN MAKING CHANGE.
5. SOLVE problems dealing with subtracting cents when making change.
6. PRACTICE making change. Your instructor will tell you more about this activity.
7. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a cash drawer, money, merchandise, and a customer.

Make change and count it out to the customer.

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Instruction Sheet I

MAKING CHANGE

Some stores have automatic change making cash registers; others do not. When you do not have an automatic change-maker, you must use the usual way of making change. Handling change correctly should be made a matter of habit. It should be done this way:

Announce the total. Let's say that the total is $12.46. You say, "That will be $12.46." The customer pays with a $10 bill and a $5 bill, which total $15.

Repeat the total and announce the amount received. You say, so the customer can hear you, "$12.46 out of $15."

Build the change. Place the two bills, face up, on top of the cash drawer. Do not put them away at this time. Then remove the change due from the drawer and count from the amount of the purchase to the amount received from the customer. This is called "building change."

Build the change as follows: $12.46 and 4 (cents) is $12.50; and 50 (cents) is $13; $13 and 1 (dollar) is $14; and 1 (dollar) is $15. You now have 4 pennies, 2 quarters, and 2 $1 bills in your hand.

You are ready to count the change back to the customer. Count the change back in the same way as you take it from the cash drawer.

Put the money away. Place the money received, face up, in the proper compartment of the cash drawer, and close the drawer.

Instruction Sheet II

SUBTRACTING CENTS WHEN MAKING CHANGE

Most of the time, a customer's bill will include cents. This happens because many items are priced with uneven amounts, such as $12.47. Some customers will offer you two extra pennies in order to receive a nickle in change rather than three pennies. This situation can be confusing, but the solution can be simple if you follow the correct procedure.

Let's say that a lady's purchase totals $12.47. She gives you $15.02. The two extra pennies means that she wants a nickel in change rather than three pennies. You say out loud so she can hear you, "$12.47 out of $15.02." Next you place the bills and pennies on top of the cash drawer. Then, subtract the two pennies both from the amount the customer gives you and from the total amount of the purchase--this leaves $12.45 and $15.00

Take the change from the cash drawer, and count from $12.45 to $15.00. Use the same method of taking the change from the cash drawer as described in Instruction Sheet I. When you count the change back to the customer, say, "You gave me the two pennies, so its's $12.45 out of $15.00." Then count back the change to the lady as you counted it out to yourself.

Instructor's Final Checklist

MAKING CHANGE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In making change, the student:

	Accomplished	Not Accomplished
1. Announced the total amount of the purchase................	[ ]	[ ]
2. Repeated the total and announced the amount received......	[ ]	[ ]
3. Placed the money received face up on the cash drawer......	[ ]	[ ]
4. Removed the change due from the cash drawer, counting from the amount of the purchase to the amount received from the customer, OR When customer included extra cents, first subtracted extra cents from both the amount received and the amount of the purchase, and then counted from the amount of purchase to amount received....................	[ ]	[ ]
5. Counted back the correct amount of change to customer.....	[ ]	[ ]
6. Put the money received face up in the proper compartments of the cash drawer................................	[ ]	[ ]
7. Closed the drawer...	[ ]	[ ]

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: GIFT WRAPPING

INTRODUCTION

Some stores provide their customers an extra service by gift wrapping merchandise they have purchased from the stores. During some seasons, such as Christmas, long lines of customers wait to get packages gift wrapped. So the gift wrapper must be able to wrap quickly as well as attractively. In this task assignment sheet, you will learn how to gift wrap a package.

OBJECTIVE(S)

GIVEN a square or rectangular box, gift wrapping supplies, and an item of merchandise,

GIFT WRAP THE MERCHANDISE.

YOUR PACKAGE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and STUDY Instruction Sheet I, PREPARING THE BOX FOR GIFT WRAPPING. PRACTICE preparing a box for gift wrapping.
2. PRACTICE wrapping a box.
3. PRACTICE putting ribbon on a box.
4. READ and STUDY Instruction II, MAKING BOWS. CHOOSE one type of bow, and PRACTICE making one.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Bring gift wrapping supplies to class.

Gift wrap an item of merchandise.

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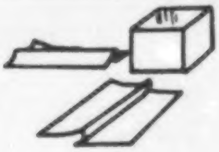
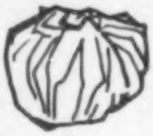
Instruction Sheet 1

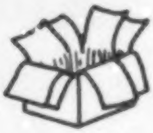
PREPARING THE BOX FOR GIFT WRAPPING



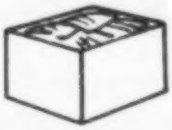
Line the box by pleating two or three thicknesses of tissue as wide as the box's width. Do the same for the length.



Cradle gift in gathered tissue.

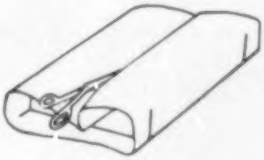


Fold the tissue lining over the cradeled gift. Enclosure card can be placed on top before closing.

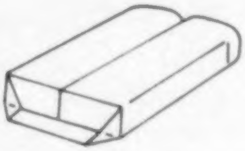


Cross inner wrapping - lining tissue color should complement color of wrapping paper.

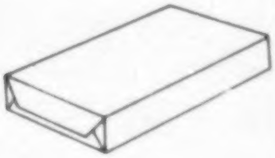
WRAPPING THE PACKAGE



Center the wrapping paper beneath the box. Lift the paper, trim the overlap so that it can be turned under slightly. Turn under and fasten with concealed tape.

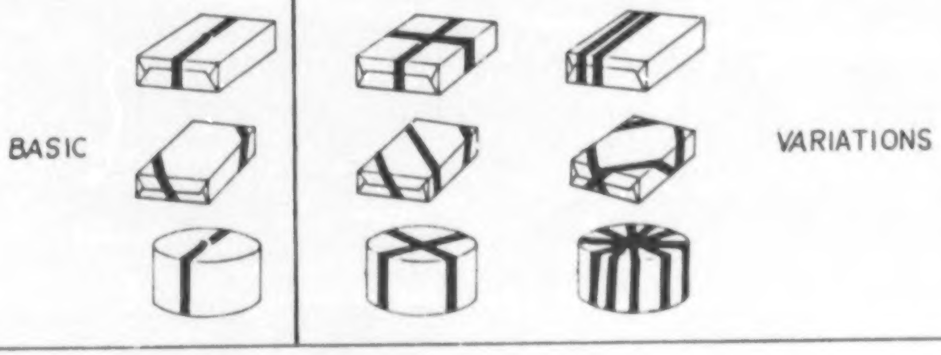


Paper should extend over both ends of the box a little more than half the depth of the box. Fasten the ends by folding the sides in, the top flap down, the bottom flap up.



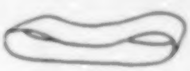
Fasten with concealed tape.

PUTTING RIBBON ON PACKAGES

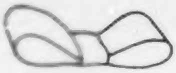


Instruction Sheet II

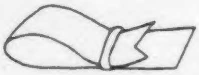
MAKING BOWS



Loop both ends of a short piece of self-adhesive ribbon.
Non-adhesive ribbon may be used, but this will require gluing.
Moisten or glue and join.

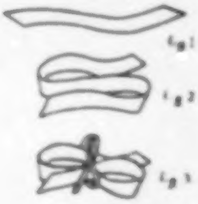


Wrap a short piece around the center. Moisten or glue the back side.

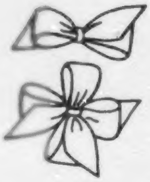


Variation: Make one loop and notch the other end as illustrated. Attach a narrow buckle .

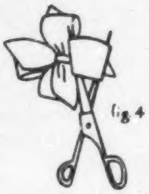
SIMPLICITY



Use 5/8" ribbon cut 6" long. Angle ends of the 6" long ribbon.
Form "s" shape (fig. 2).
Tie with 1/16" width yellow ribbon (fig. 3).

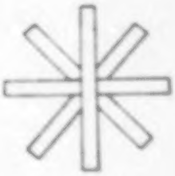


Repeat step for second petal.
Criss-cross and glue.

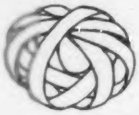


Hold center of violet with forefinger and thumb and shape each loop by inserting and opening scissors.
Trim yellow ribbon close to knot.

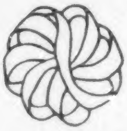
VIOLET



Crisscross 4 pieces of 11" ribbon at center and glue or moisten .



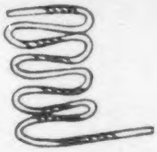
Join ends of each piece of ribbon to form a ball shape .



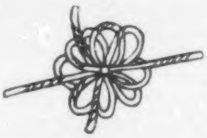
Moisten or glue the inside center of the crisscross.
Twist top a quarter turn and press firmly to bottom.

SWIRL BOW

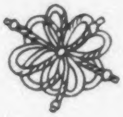
Instruction Sheet II (p. 2)



Loop the yarn back and forth as illustrated until the desired number of loops are made.

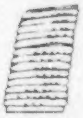


Tie the yarn in the center with a piece of spool wire.
Cut ends of loops with scissors.

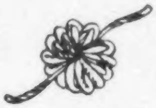


Knots may be tied in the loose ends of the yarn.

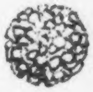
YARN BOW



Wrap the yarn around a 3x5 file card as illustrated



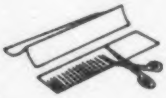
Tie tightly in the center with a separate piece of yarn.
Flare the loops to form bow



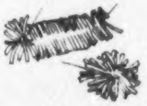
Shake the pom pom vigorously and trim the ends.
Roll it in your hands to make it fuzzy.

YARN POM POM

Cut a piece of tissue 6" wide and 20" long.
Fold the strip in half (3" wide).

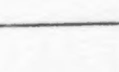


Fringe the edge to within 1/2" of the fold.

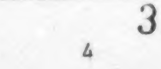


Open and flatten the fringed sheet.
Gather at the center.
Tie tightly with string or spool wire.
Fluff with fingers.

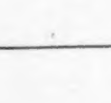
TISSUE POM POM



To make a 5" wide pleated decoration cut a piece of tissue 6" wide by 20" long.
Fold in half the long way. Crease.



Accordion-pleat (fold) every 1/2".
Cut one end of the pleated tissue on a slant.



Unfold the pleated tissue, forming a circle.
Tape the edges together at the center.

ACCORDION PLEAT (TISSUE)

Instructor's Final Checklist

GIFT WRAPPING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

	Accomplished	Not Accomplished
The student's gift wrapped package:		
1. Was properly prepared prior to gift wrapping:		
a. The box was lined with tissue..................	☐	☐
b. The merchandise was cradled in the tissue.......	☐	☐
c. The tissue was folded over the merchandise......	☐	☐
d. The merchandise was not damaged................	☐	☐
2. Was properly wrapped:		
a. The package was neat and clean.................	☐	☐
b. The paper fit snugly...........................	☐	☐
c. The end flaps were folded under to form a smooth, straight line..........................	☐	☐
d. The tape was concealed under the flaps..........	☐	☐
3. Was attractively decorated:		
a. The ribbon and bow were suitable for the paper..	☐	☐
b. The ribbon and bow were securely attached to the package....................................	☐	☐
c. The bow was the appropriate size for the package....................................	☐	☐

Task Assignment Sheet PA-MD-34
Bagger

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: BAGGING MERCHANDISE

INTRODUCTION

It is important that you know how to put each item of an order in the bag correctly. A customer who finds broken or damaged merchandise may become very angry, and the store may lose a good customer because of this. Also, bags cost money. If you use the wrong size bag or too many bags, you waste money and lower the store's profits. In this task assignment sheet, you will learn how to bag merchandise correctly.

OBJECTIVE(S)

GIVEN an order of merchandise and paper bags,

BAG THE ORDER.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, BAGGING MERCHANDISE.
2. WATCH your instructor demonstrate how to bag an order of merchandise.
3. PRACTICE bagging an order of merchandise.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

You will be given bags and an order of merchandise.

Bag the order.

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The Bureau of Vocational Education and the Office of Research and Planning
Kentucky Department of Education, Frankfort, Kentucky 40601

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Instruction Sheet 1

BAGGING MERCHANDISE

Nothing will make a customer madder than reaching home and finding damaged merchandise. Usually this happens because the bag was packed carelessly. Part of your job is keeping customers happy. If you follow these rules, customers will want to return to your store again and again.

1. Choose a bag that is the right size for the items in the order. This will save your store money.
2. Put cans or strong boxes in the bottom of the bag to form a base for other items.
3. Put heavier items in the bottom of the bag to keep the bag from turning over.
4. Put wide boxes on the side. Be sure the edges fit into the corners of the bag.
5. Put bottles in the center of the bag to keep them from spilling or breaking.
6. Put fragile items, such as light bulbs, on top so they will not be crushed or broken.
7. Put small items in the empty spaces between larger items. When more than one bag is required, divide heavy and light items evenly among the bags.
8. Do not make the bag too heavy or fill it so it will rip open.
9. Make sure you have bagged the whole order.
10. When the bag is full, fold over the top and staple the sales ticket to the fold. The top of the bag will be stapled together. (This is not necessary for groceries.)

Instructor's Final Checklist

BAGGING MERCHANDISE

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In bagging an order of merchandise, the student:

	Accomplished	Not Accomplished
1. Chose the right bag size for the order...............	☐	☐
2. Placed heavy items in the bottom of the bag..........	☐	☐
3. Placed wide boxes on the side........................	☐	☐
4. Placed glass items in the center of the bag..........	☐	☐
5. Placed fragile items on the top of the bag...........	☐	☐
6. Placed small items between larger items..............	☐	☐
7. Divided heavy and light items evenly among the bags.	☐	☐
8. Did not fill the bags too full.......................	☐	☐
9. Bagged the complete order............................	☐	☐
10. Folded over the top of the bag and stapled the sales ticket to the fold (if applicable)..................	☐	☐

Task Assignment Sheet PA-MD-35
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: TAKING TELEPHONE ORDERS

INTRODUCTION

Many customers find it convenient to order merchandise by telephone. For this reason, it is important for you to answer the telephone and take orders correctly. In this task assignment sheet, you will learn how to take telephone orders.

OBJECTIVE(S)

GIVEN a telephone setup and a caller,

TAKE THE CALLER'S ORDER.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, TAKING TELEPHONE CALLS.
2. PRACTICE taking a telephone call. Your instructor will tell you more about this activity.
3. READ, STUDY, and DISCUSS Instruction Sheet II, TAKING TELEPHONE ORDERS.
4. PRACTICE taking a telephone order. Your instructor will tell you more about this activity.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a telephone setup and a caller.

Take the caller's order.

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Instruction Sheet I

TAKING TELEPHONE CALLS

It is important that you use telephone courtesy when taking telephone calls. The following guidelines can help you:

Answer incoming calls promptly. Identify your store by name, tell the person who is speaking, and offer help. You may say, "School Store, Jamie Jones speaking." "May I help you?"

Speak clearly with normal voice volume and tone.

Speak with a smile in your voice.

Avoid eating or chewing gum.

Should you have to leave the phone for any reason, excuse yourself and set the receiver gently on the desk.

End the telephone call with a pleasant closing, assuring the customer that the order will be promptly processed.

Permit the caller to hang up first; remember, he/she called you.

Instruction Sheet II

TAKING TELEPHONE ORDERS

When taking telephone orders, the following guidelines can help you:

Keep a price list of your merchandise near the phone so that you can check prices quickly.

When you are writing the order include:

Name and address of the customer (be sure these are spelled correctly).

Customer's telephone number.

The date of the order.

Quantity, size, and description of the order.

Cost of the merchandise.

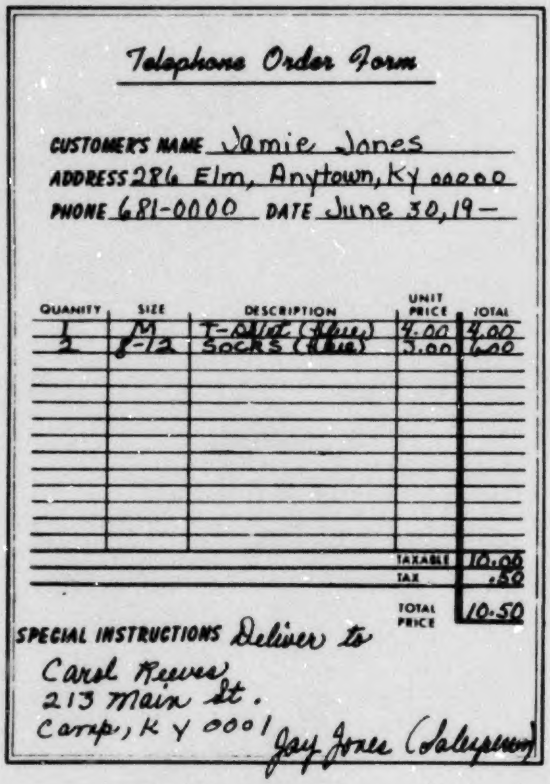
Complete name and address of the person who will receive the merchandise, when other than the customer.

Your signature, in case other employees have questions about the order.

Read the complete order back to the caller.

Study the Telephone Order form on the next page.

Instruction Sheet II (p. 2)



Telephone Order Form

CUSTOMER'S NAME Jamie Jones
ADDRESS 286 Elm, Anytown, Ky 00000
PHONE 681-0000 DATE June 30, 19—

QUANITY	SIZE	DESCRIPTION	UNIT PRICE	TOTAL
1	M	T-Shirt (Blue)	4.00	4.00
2	8-12	SOCKS (Blue)	3.00	6.00
			TAXABLE	10.00
			TAX	.50
			TOTAL PRICE	10.50

SPECIAL INSTRUCTIONS Deliver to
Carol Reeves
213 Main St.
Camp, KY 0001

Jay Jones (Salesperson)

Instructor's Final Checklist

TAKING TELEPHONE ORDERS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In taking telephone order, the student:	Accomplished	Not Accomplished
1. Observed telephone courtesy:		
a. Answered the telephone promptly	[ ]	[ ]
b. Identified the store, self, and offered help	[ ]	[ ]
c. Spoke clearly in normal volume and tone	[ ]	[ ]
d. Spoke with a smile	[ ]	[ ]
e. Avoided eating or chewing gum	[ ]	[ ]
f. Ended the call with a pleasant voice	[ ]	[ ]
g. Permitted the caller to hang up first	[ ]	[ ]
2. Took the order:		
a. Had a price list near the telephone	[ ]	[ ]
b. Wrote the order:		
--Customer's name and address, spelled correctly	[ ]	[ ]
--Customer's telephone number	[ ]	[ ]
--Current date	[ ]	[ ]
--Quantity, size, and description of order	[ ]	[ ]
--Cost of the merchandise	[ ]	[ ]
--Name and address of receiver of merchandise (when other than customer)	[ ]	[ ]
--Student's signature	[ ]	[ ]
c. Read the complete order back to the caller	[ ]	[ ]
d. Assured the customer the order would be promptly processed	[ ]	[ ]

Task Assignment Sheet PA-MD-36
Wrapper

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PREPARING PACKAGES FOR MAILING

INTRODUCTION

Stores often find it necessary to send packages through the mail. Merchandise sometimes must be returned to the manufacturer or wholesaler. Customers' orders are often mailed to them. The Post Office has certain requirements that must be met before packages will be accepted for mailing. In this task assignment sheet, you will learn how to prepare packages for mailing.

OBJECTIVE(S)

GIVEN merchandise and the necessary supplies,

PREPARE THE MERCHANDISE FOR MAILING.

YOUR MERCHANDISE must be packaged, wrapped, and addressed in accordance with the recommendations of the Postal Manual.

LEARNING ACTIVITIES

1. READ, STUDY, and DISCUSS Instruction Sheet I, PACKAGING.
2. SELECT an item of merchandise, and PACKAGE it. USE the packaging method most suitable for your merchandise. Your instructor will check your package.
3. READ, STUDY, and DISCUSS Instruction Sheet II, WRAPPING.
4. WRAP your package you prepared in Learning Activity 2. USE one of the methods described in Instruction Sheet II. Your instructor will check your work.
5. READ, STUDY, and DISCUSS Instruction Sheet III, ADDRESSING A PACKAGE.
6. ADDRESS your package.
7. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Turn in to your instructor the package you prepared for mailing.

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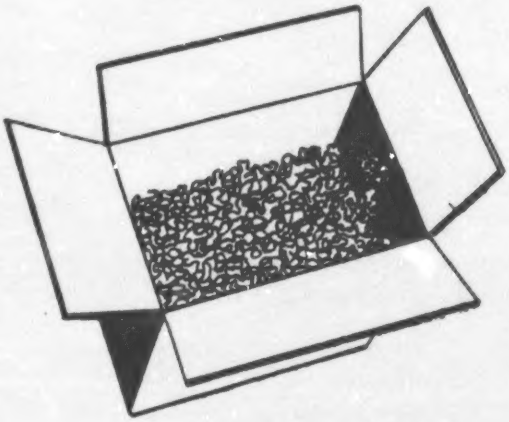
Instruction Sheet I

PACKAGING

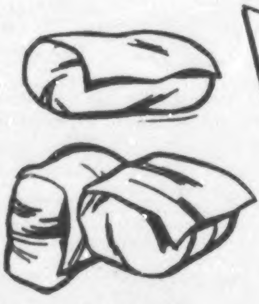
PACKAGING

(AS RECOMMENDED BY THE POSTAL MANUAL)

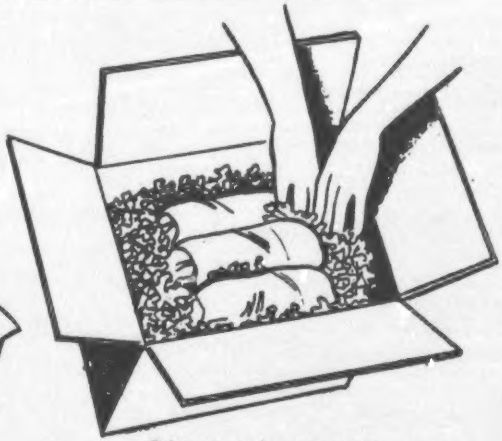
·ODD SHAPED ARTICLES:



PACK CUSHIONING MATERIAL IN BOTTOM OF CARTON.

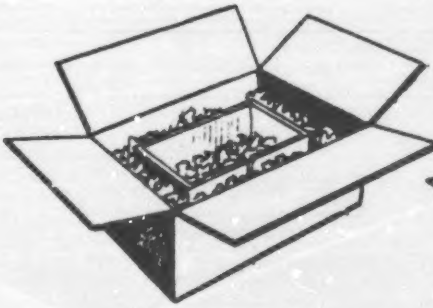


WRAP EACH ITEM SEPARATELY.

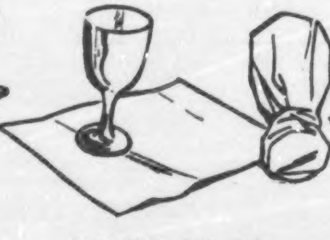


PACK WRAPPED ITEMS IN CENTER OF CARTON And PACK MATERIAL AROUND And OVER.

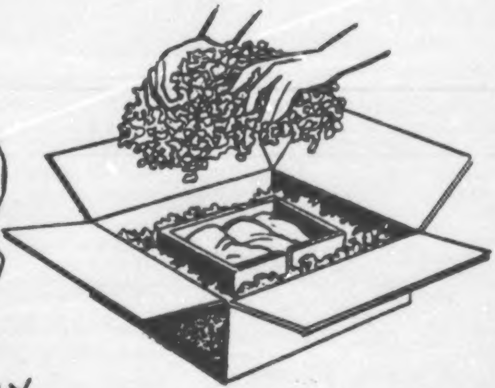
·FRAGILE ARTICLES



PLACE PACKING MATERIAL IN BOTTOM OF CARTON. PLACE INSERT IN CENTER OF PACKING.



WRAP EACH ITEM SEPARATELY.

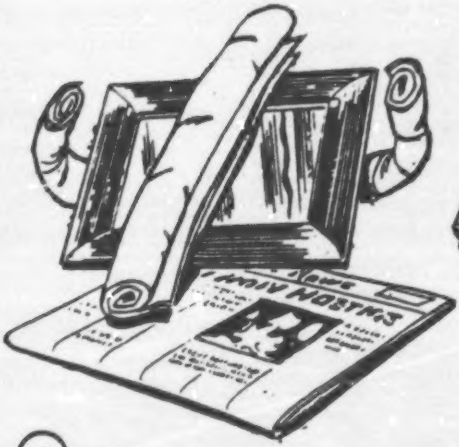


PLACE IN INSERT And COVER WITH PACKING MATERIAL.

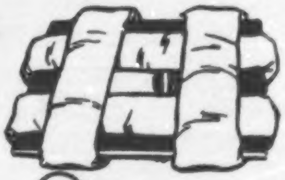
Instruction Sheet I (p. 2)

PACKAGING
(AS RECOMMENDED BY THE POSTAL MANUAL)

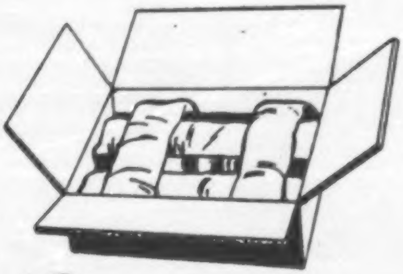
FRAMED PICTURES:



① FORM ROLLS FROM NEWSPAPER.

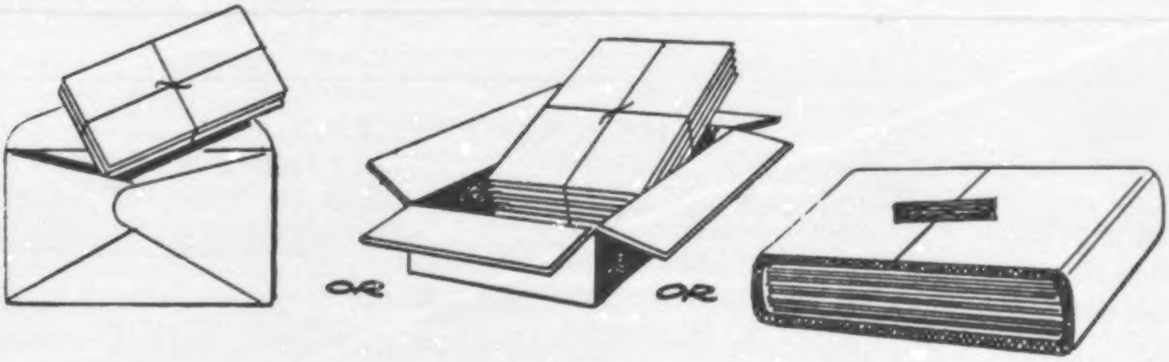


② WRAP SECURELY AROUND FRAME.



③ PACK SECURELY IN CARTON.

PAMPHLETS, FORMS, PAPERS, ETC.

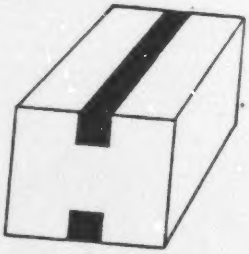


Instruction Sheet 11 (p. 2)

WRAPPING--REINFORCING CLOSURES

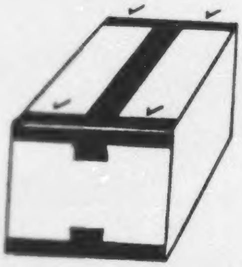
(FASTENING DOWN PACKAGE FLAPS WITH TAPE & STAPLES AS RECOMMENDED BY THE POSTAL MANUAL)

- APPLYING ONE-THICKNESS PAPER TAPE:

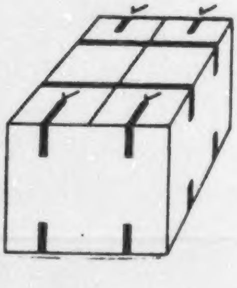


✓ MOST IMPORTANT TO TAPE HERE

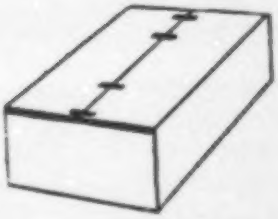
- USING REINFORCED PAPER TAPE:

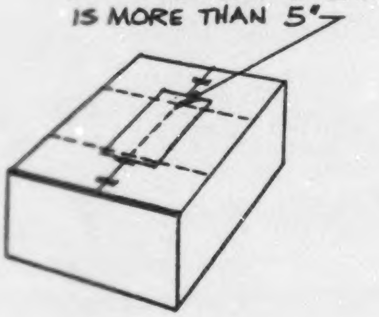


- USING PRESSURE-SENSITIVE FILAMENT TAPE:

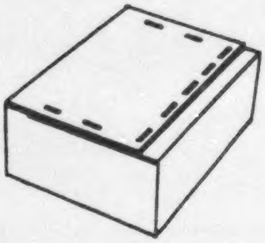


- STAPLING:





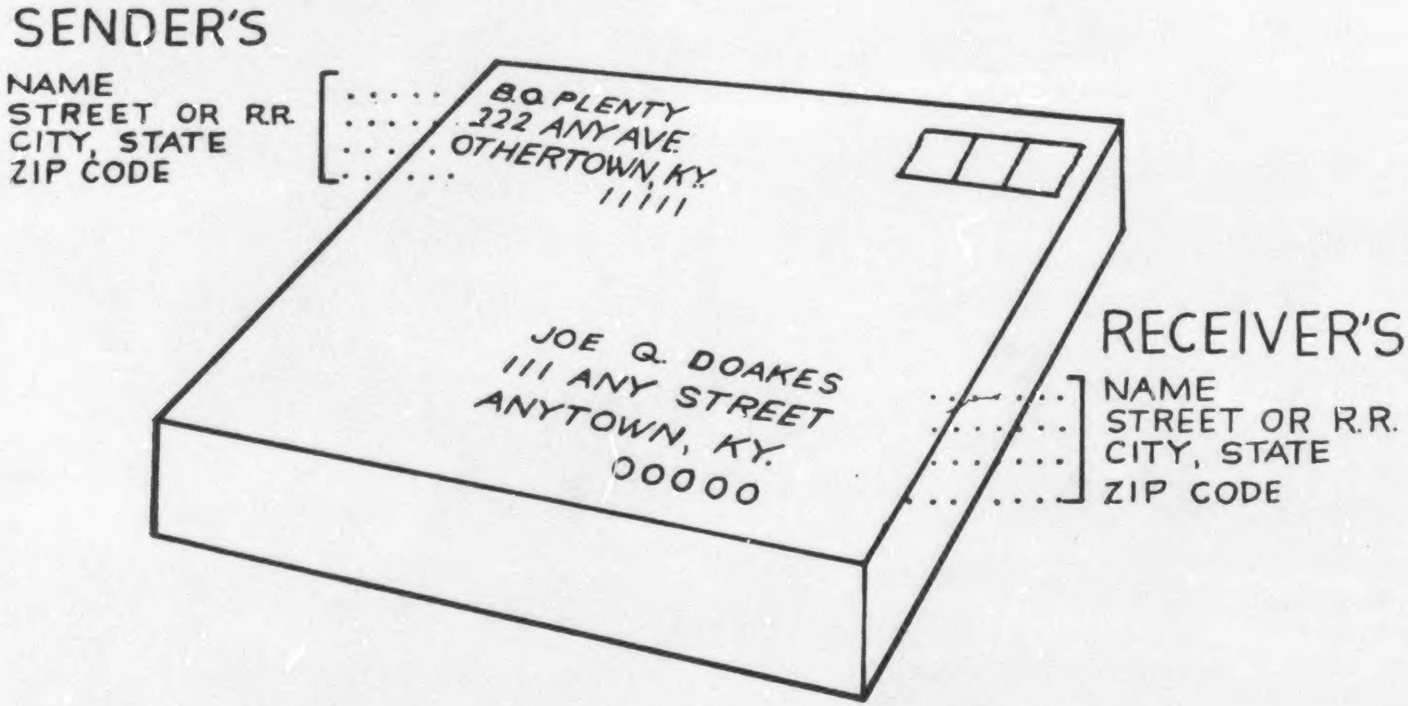
TAPE IN CENTER IF GAP IS MORE THAN 5"



Instruction Sheet III

ADDRESSING A PACKAGE

HOW TO
ADDRESS A PACKAGE FOR MAILING


SENDER'S
NAME
STREET OR R.R.
CITY, STATE
ZIP CODE
B.O. PLENTY
322 ANY AVE.
OTHERTOWN, KY.
11111
JOE Q. DOAKES
111 ANY STREET
ANYTOWN, KY.
00000
RECEIVER'S
NAME
STREET OR R.R.
CITY, STATE
ZIP CODE

Instructor's Final Checklist

PREPARING PACKAGES FOR MAILING

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In preparing a package for mailing, the student:

	Accomplished	Not Accomplished
1. Packaged the item(s) in accordance with the recommendations of the Postal Manual.................	[ ]	[ ]
2. Used the packaging method most suitable for the item(s)...	[ ]	[ ]
3. Wrapped the package in accordance with the recommendations of the Postal Manual.................	[ ]	[ ]
4. Addressed the package in accordance with the recommendations of the Postal Manual.................	[ ]	[ ]

Task Assignment Sheet PA-MD-37
Salesperson, Cashier-Checker

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: RECORDING PAYMENTS ON CHARGE ACCOUNTS

INTRODUCTION

Customers who buy merchandise on credit are usually required to make monthly payments on their accounts, and large stores handle these payments in their bookkeeping departments. Salespeople or cashier-checkers often take the payments. In this task assignment sheet, you will learn how to record payments on charge accounts.

OBJECTIVE(S)

GIVEN sales tickets and three cases of customer payments on charge accounts,

RECORD EACH PAYMENT.

EACH PAYMENT must be recorded in the proper spaces on the sales ticket, be recorded accurately, and be easy to read.

LEARNING ACTIVITIES

1. READ, STUDY, and DISCUSS Instruction Sheet I, RECORDING PAYMENTS ON CHARGE ACCOUNTS.
2. PRACTICE recording payments on charge accounts. Your instructor will tell you more about this activity.
3. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide sales tickets and three cases of customer payments on charge accounts.

Record each payment.

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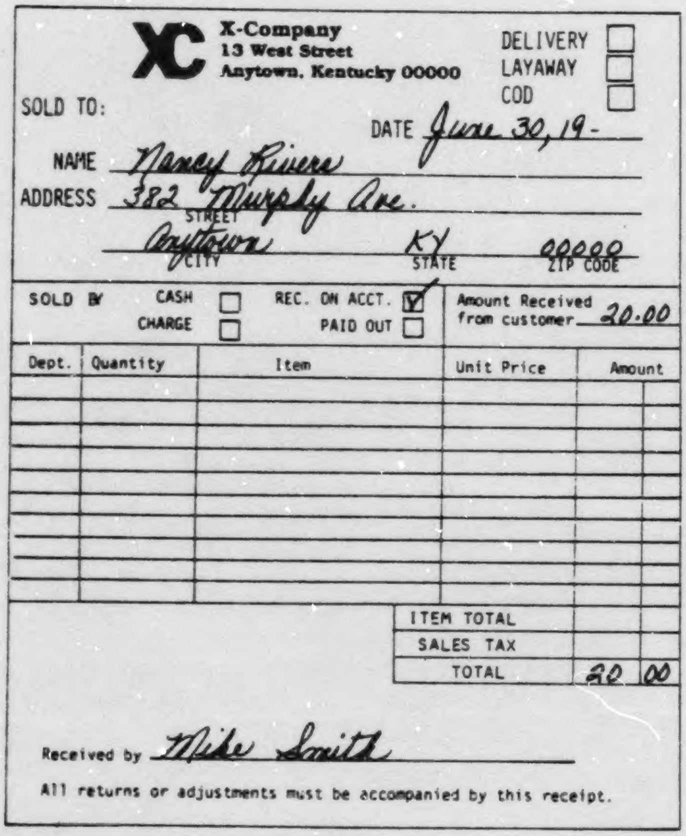
Instruction Sheet I

RECORDING PAYMENTS ON CHARGE ACCOUNTS

To record payments on customer's accounts, you fill out the proper spaces on a sales ticket. All the information recorded must be accurate and readable. Study the sales ticket below.



XC **X-Company**
13 West Street
Anytown, Kentucky 00000

DELIVERY ☐
LAYAWAY ☐
COD ☐

SOLD TO:

DATE June 30, 19-

NAME Nancy Rivera

ADDRESS 382 Murphy Ave.
STREET

Anytown KY 00000
CITY STATE ZIP CODE

SOLD BY CASH ☐ CHARGE ☐ REC. ON ACCT. ☑ PAID OUT ☐

Amount Received from customer 20.00

Dept.	Quantity	Item	Unit Price	Amount	
			ITEM TOTAL		
			SALES TAX		
			TOTAL	20	00

Received by Mike Smith

All returns or adjustments must be accompanied by this receipt.

Instructor's Final Checklist

RECORDING PAYMENTS ON CHARGE ACCOUNTS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In recording the three payments on charge accounts, the student:

	Accomplished	Not Accomplished
1. Recorded each payment on a sales ticket..............	☐	☐
2. Recorded the information in the proper spaces........	☐	☐
3. Recorded the information accurately..................	☐	☐
4. Recorded the information so that it is easy to read..	☐	☐

Task Assignment Sheet PA-MD-38
Salesperson, Cashier-Checker

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: RECORDING CASH REFUNDS

INTRODUCTION

Customers often find it necessary to return merchandise that has been purchased from a store. The store must keep a record of the transaction when the customer receives a cash refund. In this task assignment sheet, you will learn how to record cash refunds for merchandise returned.

OBJECTIVE(S)

GIVEN a customer request for a cash refund and a Merchandise Returns Form,

RECORD THE CASH REFUND.

THE INFORMATION should be recorded in the correct spaces on the Merchandise Returns Form, be recorded accurately, and be easy to read.

LEARNING ACTIVITIES

1. READ, STUDY, and DISCUSS Instruction Sheet I, RECORDING CASH REFUNDS.
2. PRACTICE recording cash refunds. Your instructor will tell you more about this activity.
3. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a customer request for a cash refund and a Merchandise Returns Form.

Record the cash refund.

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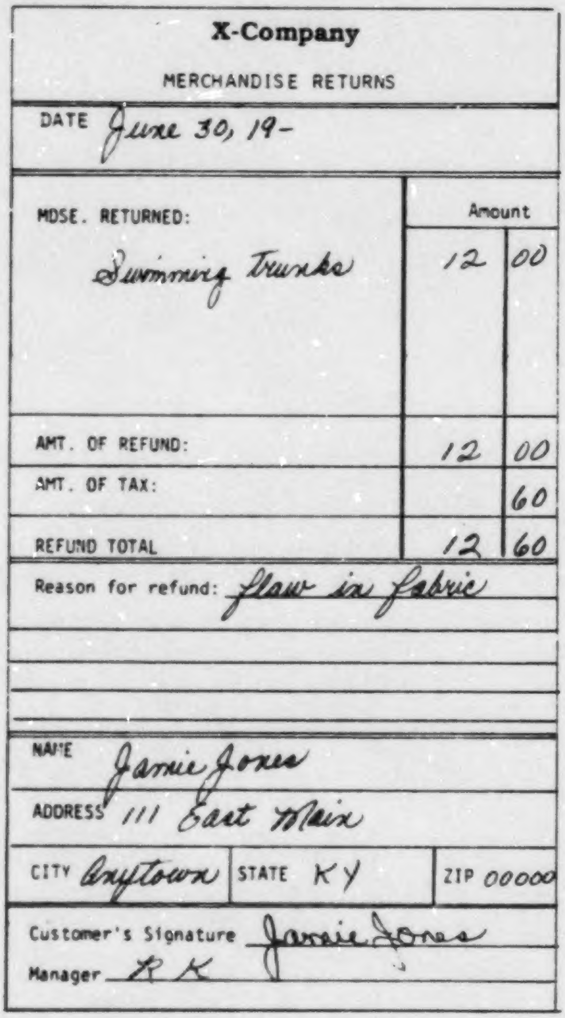
Instruction Sheet I

RECORDING CASH REFUNDS

Cash refunds usually have to be approved by your store manager or by another person who has the authority to do so. Once you obtain the approval, you fill out the Merchandise Returns Form. Study the sample form below.



X-Company

MERCHANDISE RETURNS

DATE June 30, 19-

	Amount	
MDSE. RETURNED: Swimming trunks	12	00
AMT. OF REFUND:	12	00
AMT. OF TAX:		60
REFUND TOTAL	12	60

Reason for refund: flaw in fabric

NAME Jamie Jones

ADDRESS 111 East Main

CITY Anytown STATE KY ZIP 00000

Customer's Signature Jamie Jones

Manager R K

Instructor's Final Checklist

RECORDING CASH REFUNDS

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In recording cash refunds, the student:	Accomplished	Not Accomplished
1. Recorded the information in the correct spaces on the Merchandise Returns Form......................	☐	☐
2. Recorded the information accurately..................	☐	☐
3. Recorded the information so that it is easy to read..	☐	☐

Task Assignment Sheet PA-MD-39
Cashier

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PREPARING THE CASHIER'S REPORT

INTRODUCTION

At the end of each work day, a cashier counts and lists the money in the cash drawer. This tells the store manager how much money was taken in for the day. In this task assignment sheet, you will learn how to prepare the cashier's report.

OBJECTIVE(S)

GIVEN a cash drawer, sales tickets, and a Cashier's Report Form,

PREPARE THE CASHIER'S REPORT.

YOUR REPORT should be accurate, neat and easy to read.

OR

GIVEN a problem dealing with money handled for the work day and a Cashier's Report Form,

PREPARE THE CASHIER'S REPORT.

YOUR REPORT should be accurate, neat and easy to read.

LEARNING ACTIVITIES

1. READ, STUDY, and DISCUSS Instruction Sheet I, THE CASHIER'S REPORT.
2. PRACTICE filling out a Cashier's Report Form by completing Student Self-Check I, PREPARING A CASHIER'S REPORT.
3. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a cash drawer, sales tickets, and a Cashier's Report Form,

OR

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Your instructor will provide a problem dealing with money handled for the work day and a Cashier's Report Form.

Prepare the Cashier's Report.

Instruction Sheet I

PREPARING A CASHIER'S REPORT

Study the Cashier's Report below.

CASHIER'S REPORT

Date June 30, 19--

Pennies	.50
Nickles	$2.00
Dimes	5.00
Quarters	10.00
Half Dollars	3.00
Silver Dollars	2.00
Paper Bills	50.00
Total Cash in Drawer	$72.50
Beginning Cash (Cash put in drawer at beginning of work day)	$20.00
Sales Tickes (Cash taken in for the day)	54.20
Total Cash Handled (If correct, will agree with "Total Cash in Drawer.")	$72.40
Cash Short	
Cash Over	.10

Cashier's Name Jamie Jones

Student Self-Check I

PREPARING A CASHIER'S REPORT

Your instructor will give you a copy of a Cashier's Report Form. Use the form to work the problem below. When you have finished, check your answers with the ones on the next page.

Cash in Drawer:

Pennies	85 each
Nickels	15 each
Dimes	20 each
Quarters	12 each
Halves	6 each
Silver Dollars	2 each
Paper Bills	10 each $1 bills, 3 each $5 bills, 4 each $10 bills
Beginning Cash	$25.00
Sales Tickets	52.00

Student Self-Check I (p. 2)

ANSWERS

CASHIER'S REPORT

Date Today's

Pennies	.85
Nickles	.75
Dimes	2.00
Quarters	3.00
Half Dollars	3.00
Silver Dollars	2.00
Paper Bills	65.00
Total Cash in Drawer	$ 76.60
Beginning Cash	$ 25.00
Sales Tickets	52.00
Total Cash Handled	$ 77.00
Cash Short	.40
Cash Over	

Cashier's Name (Your Name)

Instructor's Final Checklist

PREPARING THE CASHIER'S REPORT

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student Cashier's Report was:

	Accomplished	Not Accomplished
1. Accurate..	[ ]	[ ]
2. Neat..	[ ]	[ ]
3. Easy to read..	[ ]	[ ]

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: PREPARING TO TAKE INVENTORY

INTRODUCTION

Store owners need to keep a record of the stock they have on hand and the retail value of that stock. To do this, they go through a procedure known as taking inventory. Before the actual inventory can be taken, the stock has to be arranged in a certain manner and a master list made. In this task assignment sheet, you will learn how to prepare to take inventory.

OBJECTIVE(S)

GIVEN a supply of stock with price tickets attached and an Inventory Sheet,

PREPARE AND LIST THE STOCK FOR INVENTORY.

YOUR PERFORMANCE WILL BE RATED in accordance with the Instructor's Final Checklist.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, PREPARING AND LISTING THE STOCK FOR INVENTORY.
2. WATCH your instructor demonstrate how to divide and group stock for inventory.
3. PRACTICE grouping merchandise for inventory. Your instructor will tell you more about this activity.
4. LOOK AT a layout chart which your instructor will show you.
5. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide a supply of stock and an inventory sheet.

Prepare and list the stock for inventory.

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Instruction Sheet I

PREPARING AND LISTING THE STOCK FOR INVENTORY

When planning to take inventory, do the following:

1. Group the stock according to type, style, and retail price; for instance, Eads Notebooks, Style 06-9900, $3.00.
2. Make a master list of the different groups of stock. Look at the example below.

QUANTITY	DESCRIPTION	UNIT PRICE	TOTAL PRICE
	Eads Subject Notebook 06-9800		
	Eads Subject Notebook 06-7845		
	Eads Spiral Notebook 06-4623		
	Black Carbon Paper		

3. Starting at the left of the table or shelf, arrange the stock in the sequence listed on the Inventory sheet.
4. Make a layout chart showing how the stock is arranged.

Instructor's Final Checklist

PREPARING STOCK FOR INVENTORY

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

In preparing stock for inventory, the group of students:

	Accomplished	Not Accomplished
1. Divided and grouped the stock according to type, style, and price	[ ]	[ ]
2. Changed the prices on the price tags to current market prices, when necessary	[ ]	[ ]
3. Made a master list of the different kinds of inventory	[ ]	[ ]
4. Arranged the stock in the sequence listed on the Inventory Sheet	[ ]	[ ]
5. Made a layout chart of the stock to be inventoried	[ ]	[ ]

Task Assignment Sheet PA-MD-41
Salesperson

Practical Arts

MARKETING AND DISTRIBUTION OCCUPATIONS

TASK: TAKING INVENTORY

INTRODUCTION

When the stock has been prepared and a master stock list has been made, the stock is ready to be inventoried. The completed inventory tells the store owner the retail value of all stock in the store. In this task assignment sheet, you will learn how to take inventory.

OBJECTIVE(S)

GIVEN stock prepared for inventory and an Inventory sheet with a master listing of the inventory,

COUNT THE ITEMS OF STOCK AND COMPLETE THE INVENTORY SHEET.

THE COMPLETED INVENTORY SHEET should include the quantity, unit price, and total price for each type of stock described. It should also include the total retail value of the stock inventoried.

LEARNING ACTIVITIES

1. READ and DISCUSS Instruction Sheet I, STEPS IN TAKING INVENTORY.
2. WATCH your instructor count an item of stock and complete the Inventory sheet.
3. PRACTICE completing an Inventory sheet. Your instructor will tell you more about this activity.
4. ARRANGE with your instructor to complete this task by going through the CHECK-OUT ACTIVITIES.

CHECK-OUT ACTIVITIES

Your instructor will provide an Inventory sheet and a supply of stock prepared for inventory.

Count the items of stock and complete the Inventory sheet.

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Instruction Sheet I

STEPS IN TAKING INVENTORY

When you take inventory, follow this procedure.

1. Get a copy of the Inventory sheet your group of classmates prepared in Task Assignment Sheet PA-MD-40. It has the master list of stock at your work station.

2. Fill in the heading of the Inventory sheet.

3. Count the number of items for each type of stock listed in the Description column. Enter the count in the Quantity column. (Note: Begin counting the stock located at the left of the shelf and move to the right.)

4. Check the price ticket on an item in each type of stock to determine the unit price ("Unit" means "one" item.) Enter the amount in the Unit column.

5. Multiply the quantity by the unit to determine the total price of the type of stock. Enter the amount in the Total Price column.

6. When the inventory has been completed and recorded on the Inventory sheet, add the amounts in the Total Price column to determine the total retail value of the stock.

Instructor's Final Checklist

TAKING INVENTORY

Performance Level: All items must receive a rating of ACCOMPLISHED. If any items are rated NOT ACCOMPLISHED, the student and the instructor will decide if any learning activities must be repeated.

The student's completed Inventory sheet included:	Accomplished	Not Accomplished
1. The correct quantity of each type of stock...........	☐	☐
2. The correct unit price for each type of stock........	☐	☐
3. The correct total amount for each type of stock......	☐	☐
4. The correct total retail value for all the stock inventoried..	☐	☐